



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

January 2004



DEPARTMENT OF PLANNING & ZONING

Marsha S. McLaughlin, Director

January 30, 2004

A Message from the Planning Director:

I am pleased to present the annual Development Monitoring System Report. This is the twelfth report issued since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. The report summarizes all development activity in the County from initial subdivision sketch plan phase to final use & occupancy permit. Both approved and in-process residential and nonresidential plans are discussed and categorized by location, type and intensity. Resulting population and employment impacts are then discussed. Comparisons to previous years' development activity are also included. In addition, there are sections on housing sales data, land preservation statistics and the status of APFO housing unit allocations. The intent is to consolidate, summarize and discuss development activity in Howard County on a yearly basis in a single report. Highlights to the report are located on Page 2 of the Executive Summary.

It is apparent that residential development activity is slowing as the number of available housing unit allocations declines to the levels imposed by General Plan 2000. Last year there were 1,397 completed housing units in the County, a significant reduction from previous years when there were about 2,000 units built per year on average. Reduction in supply coupled with continuous strong demand has put pressure on housing prices, with the average sales price of all homes sold last year increasing by almost 15%, from \$258,000 to \$296,000. Two-thirds of the units built last year were single family detached, 19% townhouse units and 16% apartment units (including condo apartments). Last year, as part of the subdivision process, 440 acres were permanently preserved as agricultural and environmental easements in the Rural West.

The amount of non-residential building increased slightly to more than 1.8 million square feet in issued building permits, up from close to 1.7 million square feet the year before. This is still below the five year average, however, of 2.7 million square feet which resulted from the high level of economic activity in the years just prior to the recent recession. There are about 1.5 million square feet in-process as site development plans, an indication that the current pace of nonresidential development is likely to continue into next year. As the current economic recovery continues, the County is poised to have moderate job growth in the years ahead.

Sincerely,

Marsha S. McLaughlin
Director

Development Monitoring System Report

Date Issued:

January 2004

Reporting Period:

October 1, 2002 to September 30, 2003
With countywide summaries from October 1, 1998

Produced by:

Howard County Department of Planning and Zoning
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Executive Summary

Adequate Public Facilities Act

The Adequate Public Facilities Act of 1992, expressed "the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist."

Section 16.1108 of the Adequate Public Facilities Act directs that "The Department of Planning and Zoning will monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- (1) Subdivision plans and site development plans approved during the last several years, including number of residences or the number of new employees projected for the approved subdivisions and land developments.
- (2) Subdivision plans and site development plans in-process at the time of the report, including the number of housing unit allocations or the number of new employees projected for the proposed subdivisions and land development.
- (3) Building permits and certificates of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued."

This is the twelfth annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits.

Both approved and currently in-process land development plans are tabulated. Annual data for development activity are reported for the period October 1 through September 30 for the past five years beginning in October 1, 1998. More detailed information is reported for the most current year, October 1, 2002 to September 30, 2003. The report is divided into Residential and Non-Residential parts.

The section below discusses the highlights in this year's report. The following sections discuss the residential and nonresidential findings in more detail providing comparison charts by development stage. The second and third parts of this report, beginning on Pages 17 and 53, respectively, provide even more detail within each stage of development as well as further explanation on the land development process in Howard County.

Highlights

Residential Development

- Over the last five years, there has been an average of close to 2,000 new housing units built in the County each year. About 65% of these have been single family detached, 19% single family attached, and 16% apartment units (including both rental and condo).
- Last year, there were only 1,397 completed units, a significant reduction from previous years. Of these, 67% were for single family detached, 17% for single family attached and 16% for apartment units. It can be anticipated that the number of completions will remain at a lower annual level due to APFO restrictions.
- Last year, there were 1,251 units from recorded lots, 926 units approved

in site development plans and 1,209 building permits issued. This compares to five year annual averages of 1,114 units from recorded lots, 1,336 units in approved site development plans and 1,831 building permits issued.

- Last year about one-third of all units were built in Ellicott City, 22% in the Southeast, 19% in the Rural West and 15% in Columbia. The remaining 10% were in ElkrIDGE.
- As of September 30, 2003 there were 6,819 units in the subdivision process. This represents all units in plans under review prior to being recorded and is about the same as the 6,776 units in process one year earlier (September 30, 2002).
- More than half of units in process are part of phased plans, with building planned for future years as far out as 2014. The larger phased plans include Emerson and Maple Lawn in the Southeast and Turf Valley, Montjoy Farm and the Taylor properties in Ellicott City.
- Countywide, 45% of the units in process on September 30, 2003 were single family units. About 23% were single family attached units and another 32% were apartment units (including both condo and rental).

Rural Land Preservation

- Last year, 440 acres of agricultural and environmentally sensitive land were permanently preserved. All of this preserved acreage is a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations. An additional 15 acres were preserved through the State preservation program.
- Since 1992, 9,271 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 71 percent of this total, 6,598 acres, has gone into preservation and permanent open space. The remaining 29 percent, 2,673 acres, has been or is planned for development on 2,131 lots and 242 acres of roadway.

Housing Sales

- The cost of housing in Howard County has been increasing steadily, from a mean sales price of \$205,013 in 98/99 to \$295,592 last year for all housing types combined. This is an overall increase of 44.2 percent over the four year time period and an annual increase of about 9.6 percent. (See Page 46 for further details.)

Non-Residential Development

- First quarter employment data provided by the State (the latest available), shows that there were 107 jobs *lost* in Howard County, the first reported job loss in more than a decade. This is due to the recent recession and reflected in higher nonresidential vacancy rates. Vacancy rates are declining, however, and it is anticipated that job growth will continue as the effects of the recession wane.
- Over the last 5 years, the State reports that 22,503 new jobs were created, an average of 4,501 jobs per year reflecting the strong local and regional economies over this time period (with the exception of last year and a slowdown in the previous year when only 2,621 jobs were added).
- Based on building space in last year's approved site development plans an estimated 2,528 jobs could be accommodated. About 3,066 potential jobs could be accommodated based on last year's issued building permits. This is an indication that nonresidential development is continuing and bodes well for confidence in a recovering economy.
- Last year about 1.8 million square feet of building space was approved in site development plans. Building permits were issued for almost 1.6 million square feet. Over the last five years, the average annual amount was 2.8 million square feet in approved site development plans and 2.7 million square feet in issued building permits.
- Most of the new building space is located in the I-95 Corridor and Columbia. Comparably less space was planned in Ellicott City and a moderate amount in the West
- Most of the overall development is for manufacturing/extensive indus-

trial space (46% of total building permits), followed by office/service space (26%), retail space (16%), government and institutional space (10%) and other (2%).

- As of September 30, 2003, there were 1.5 million square feet in-process in site development plans. This is less than the 1.7 million square feet in process the previous year, but greater than the 1 million square feet in process the year before.

Residential Development

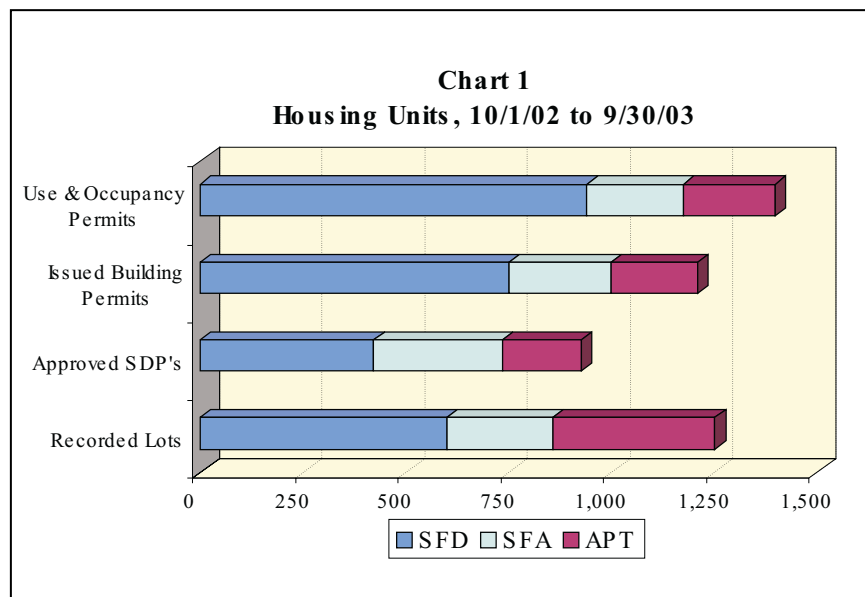
Development Activity

Chart 1 on the following page shows residential development activity from October 1, 2002 to September 30, 2003. Last year, a total of 1,397 use & occupancy permits and 1,209 building permits were issued. There were 926 units in approved SDP's and 1,251 units from recorded lots.

The following table shows the number of issued use and occupancy permits for each year starting in 1998. In 1998, there were over 2,000 completions, rising to almost 2,500 for the following year. The next two years each had about 1,900 completions. Last year, there was a considerable decrease to only 1,397 completions, about a 400 unit reduction. This slowdown is anticipated to continue reflecting the current housing unit allocation chart.

Issued Use and Occupancy Permits by Unit Type, 10/01/98 to 9/30/03

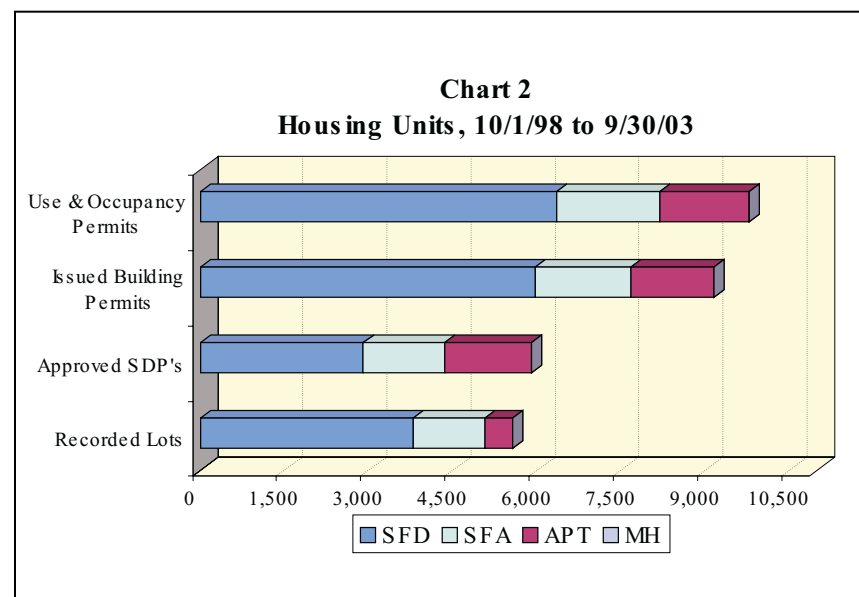
Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	1,350	422	273	0	2,045
10/99 to 9/00	1,708	425	361	0	2,494
10/00 to 9/01	1,346	379	179	0	1,904
10/01 to 9/02	1,011	367	573	0	1,951
10/02 to 9/03	940	235	222	0	1,397
TOTAL	6,355	1,828	1,608	0	9,791
PERCENT	65%	19%	16%	0%	100%
5 YEAR AVE.	1,271	366	322	0	1,958



As indicated in Chart 2, for the five year growth period from October 1, 1998 to September 30, 2003, a total of 9,791 use & occupancy permits and 9,157 building permits were issued. This averages to 1,958 use and occupancy permits and 1,831 building permits issued per year over the five year time period. Over the five years, there were a total of 6,829 units in approved SDP's and 5,569 units from recorded lots. This results in a five year average of 1,366 and 1,114 units per year, respectively.

It is important to note that residential development in the County typically begins with the subdivision process where new lots are recorded, followed by the site development plan (SDP) process, and then the issuance of building and use & occupancy permits. However, not all recorded lots must go through SDP phase and not all units reflected in SDP's are units that went through the subdivision process.

Prior to amendments to the Subdivision and Land Development Regulations, effective January 8, 2002, residential SDPs were required for all residential lots 20,000 square feet or less. The amended regulations now require site development plans for *all lots in the East*. Lots in the Rural



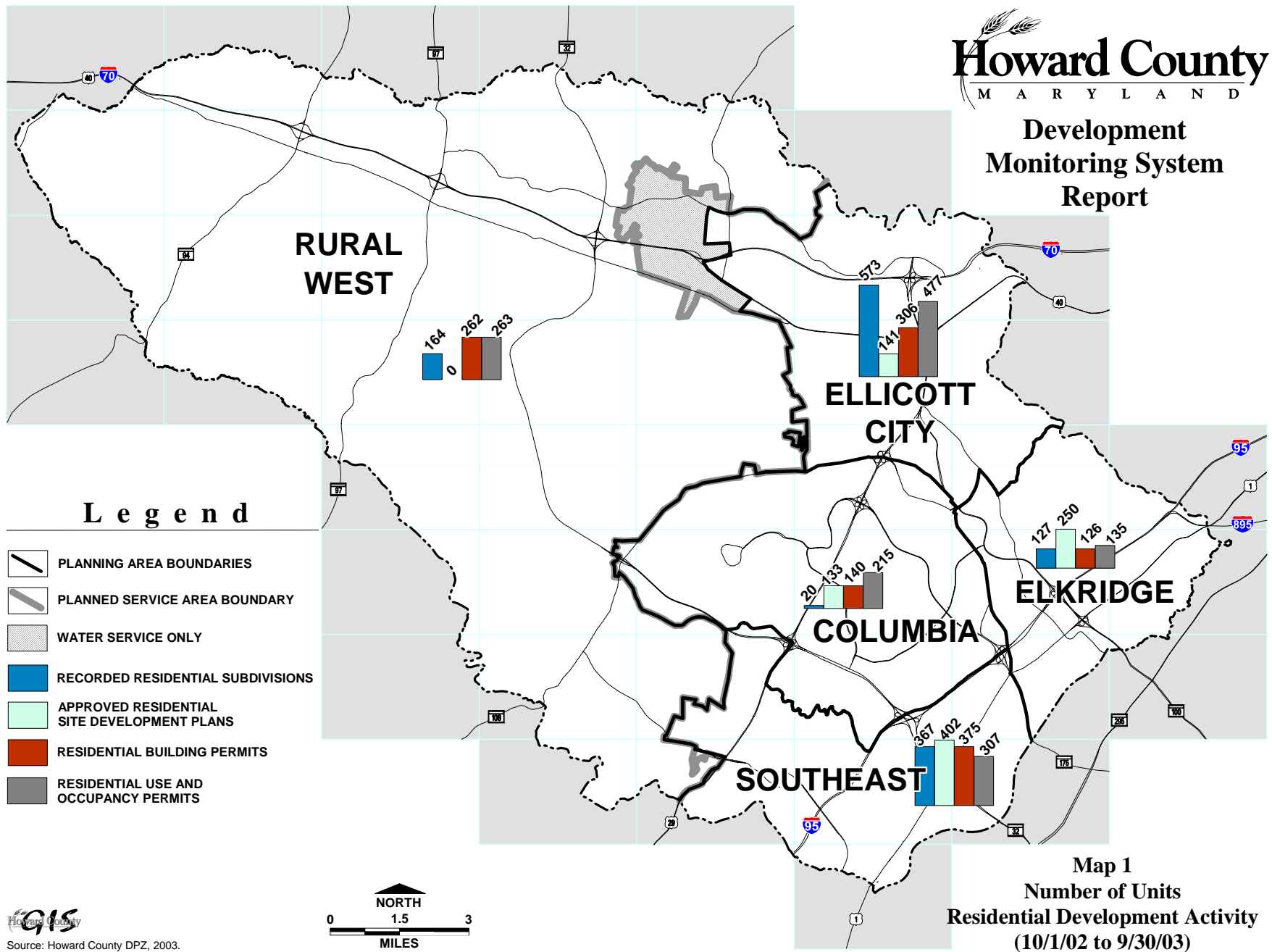
West are not required to have SDPs. Consequently, SDPs do not account for all residential growth in the County.

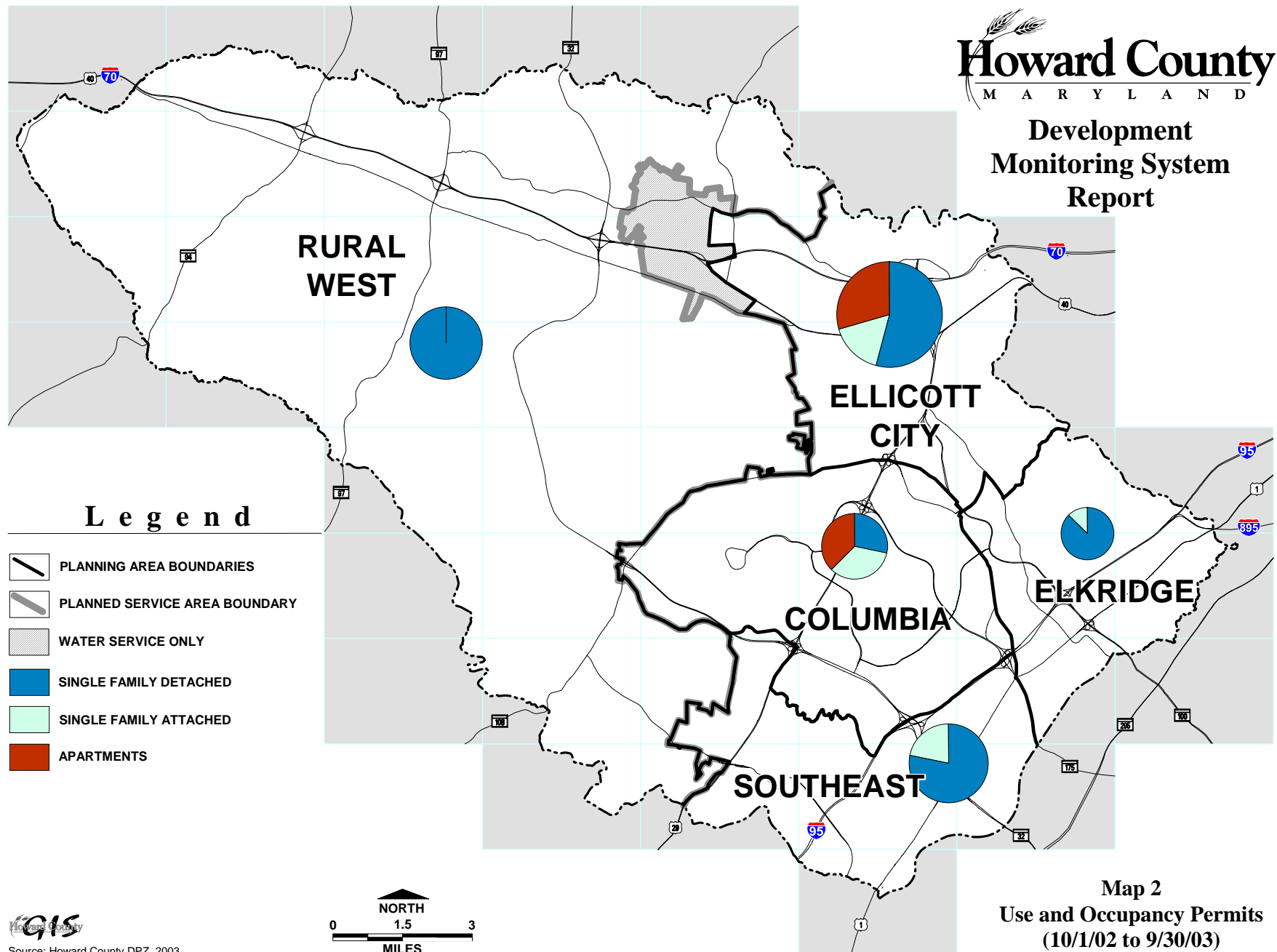
Also, not all units in SDP's, such as apartment buildings on bulk parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1998. Since all new housing units require building permits and ultimately use and occupancy permits, these measures more fully reflect actual development activity in the County. This also explains why the numbers of recorded lots and units in SDP's are less than the numbers of building and use & occupancy permits.

Development Location

Map 1 shows the development activity last year for each development stage by planning area. Residential development activity is reported by five planning areas. These planning areas are consistent with General Plan projections and the Adequate Public Facilities Ordinance.

It is clear that much of the activity has been concentrated in Ellicott City and the Southeast. There has been comparably less activity in the Rural





West, Elkridge and Columbia. Note that in Ellicott City and the Southeast, the number of newly recorded lots is high which will result in more building and use & occupancy permits to come in the future. These primarily consist of the developments of Emerson and Maple Lawn in the Southeast and the Taylor properties in Ellicott City.

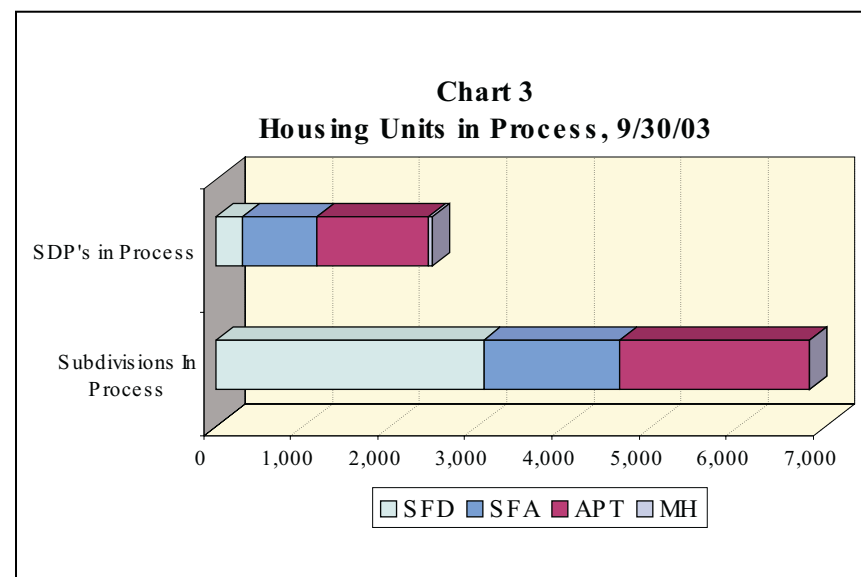
Map 2 shows the use & occupancy permits issued last year by unit type for each planning area. In addition to showing the unit type breakdown in each region, the size of the pie charts also reflect the relative number of issued permits.

The overall Countywide breakdown of issued use & occupancy permits last year was 67 percent single family detached, 17 percent single family attached and 16 percent apartment units. The map clearly shows how this varies by planning area with all of the permits for apartment units being issued in Columbia and Ellicott City. Most of the townhouses were built in Ellicott City, Columbia and the Southeast.

Plans In Process

Chart 3 shows the number of potential housing units that are in the subdivision and site development plan process. These are units in subdivision plans that are not yet recorded and site development plans that are not yet approved. As of September 30, 2003, there were 6,819 units in the subdivision process and 2,489 units in the site development plan process. For comparison purposes, for the previous year on September 30, 2002 there were 6,776 units in the subdivision process and 1,151 units in the site development plan process.

It is important to note that a significant number of the 6,819 potential units in the subdivision process are part of phased projects with building planned for future years. Of the total 6,819 units, 3,924 are part of phased plans, with building planned as far out as 2014 (in the case of Maple Lawn). This represents about 58 percent of all units in process. Most of the phased projects are in the Southeast and Ellicott City. The larger projects include Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties and Mont joy Farm in Ellicott City.

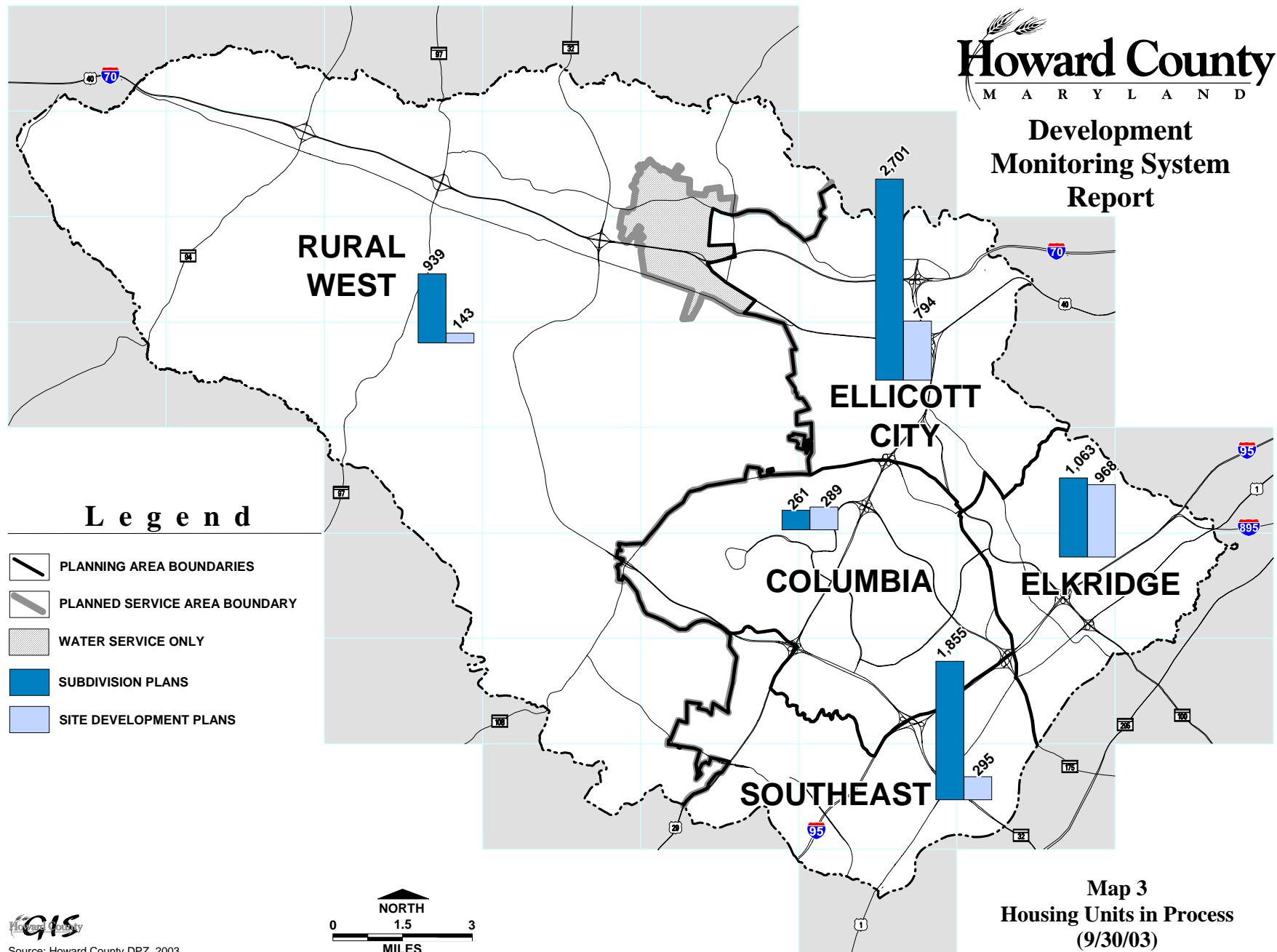


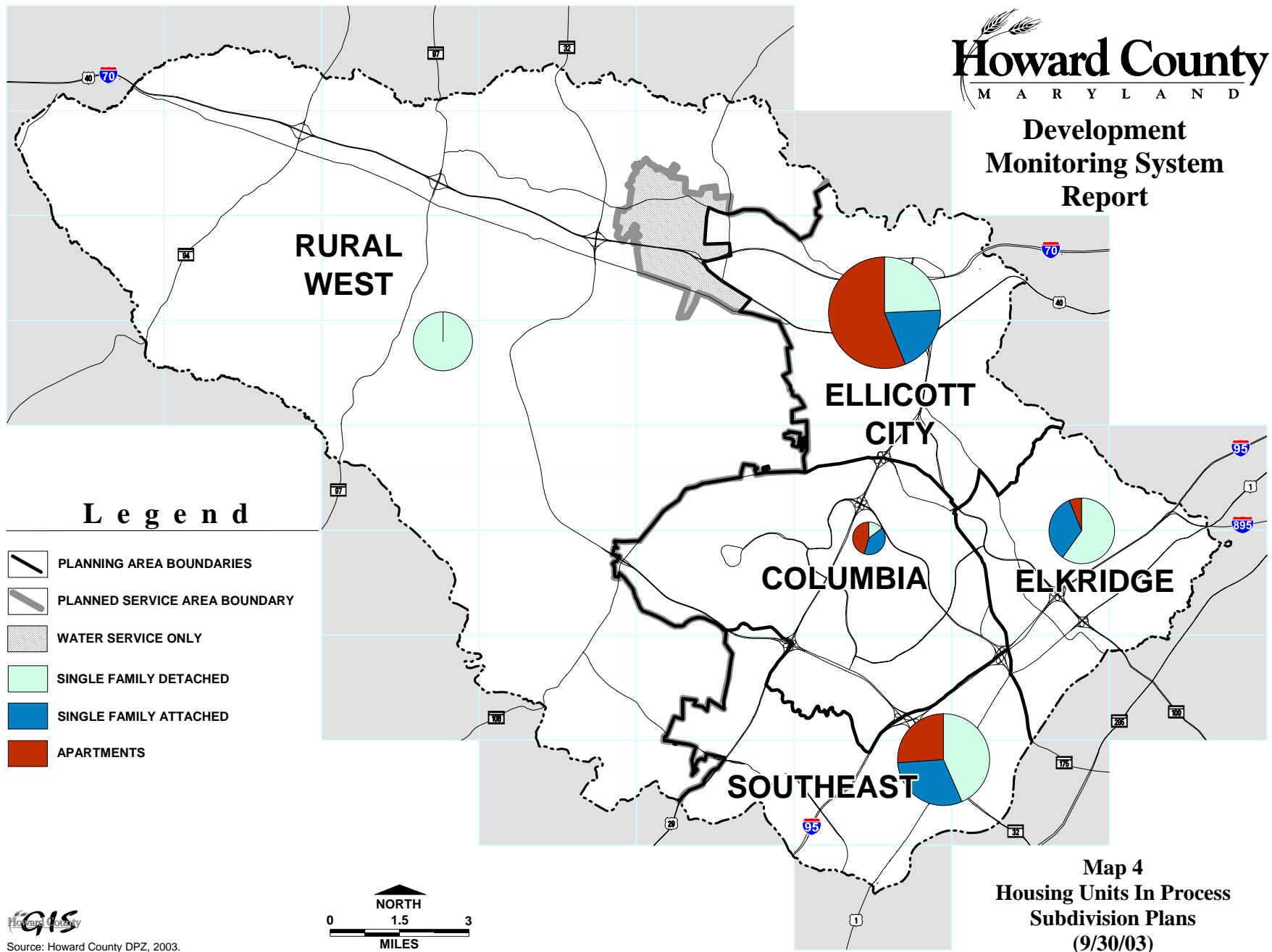
Plans in Process by Location

Map 3 shows the in process plans distributed by location. Of the 6,819 potential units from subdivision plans in process, Ellicott City has the greatest number with 2,701, 40 percent of the total. This is followed by the Southeast with 1,855 units in process (27 percent). Elkridge has 1,063 units in process, followed by 939 in the Rural West and 261 in Columbia.

Of the 2,489 units in the site development plan process, 968 are in Elkridge, 794 in Ellicott City, 295 in the Southeast, 289 in Columbia and 143 are in the Rural West.

Map 4 shows the number of units in the subdivision plan process by unit type for each planning area. On September 30, 2003 all planning areas had single family detached units in process. Most in process single family attached or townhouse units were in the Southeast, the location of three mixed use projects – Emerson, Maple Lawn and Cherry Tree. The Southeast also had a large number of apartment units in process, although Ellicott City had the most. The Rural West only had single family units in process.





Countywide, 45 percent of the units in process on September 30, 2003 were single family units. About 23 percent were single family attached units and another 32 percent were apartment units.

Rural Land Preservation

Last year, from October 1, 2002 to September 30, 2003, 127 acres of land were preserved and enrolled in Howard County's Agricultural Land Preservation Program. An additional 313 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels resulting in a total of 440 permanently preserved acres. All of this preserved acreage was a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations. An additional 15 acres were preserved through the State preservation program.

Since 1992, 9,271 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 71 percent of this total, 6,598 acres, has gone into preservation and permanent open space. The remaining 29 percent, 2,673 acres, has been or is planned for development on 2,131 lots with 242 acres of roadway.

To date, there are about 18,947 acres of permanently preserved agricultural land in the Rural West and about 4,422 acres preserved as other easement types, for a total of 23,369 acres. This is about 25 percent of the approximate 94,600 total acres of land in the Rural West.

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 34,102 acres, about 36 percent of all land in the Rural West. Please refer to the Land Preservation Section, Page 49, for further details.

Non-Residential Development

Job Growth

Charts 4 and 5 show potential employment from approved site develop-

Chart 5
5-Year Job Growth, 10/1/98 to 9/30/03¹

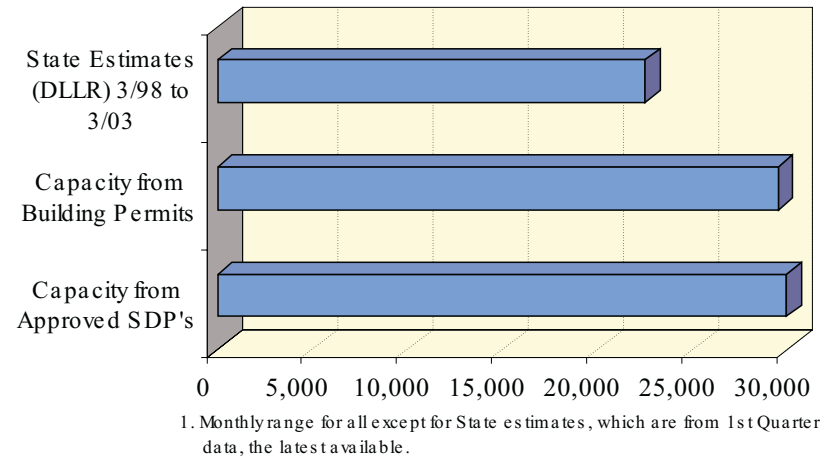
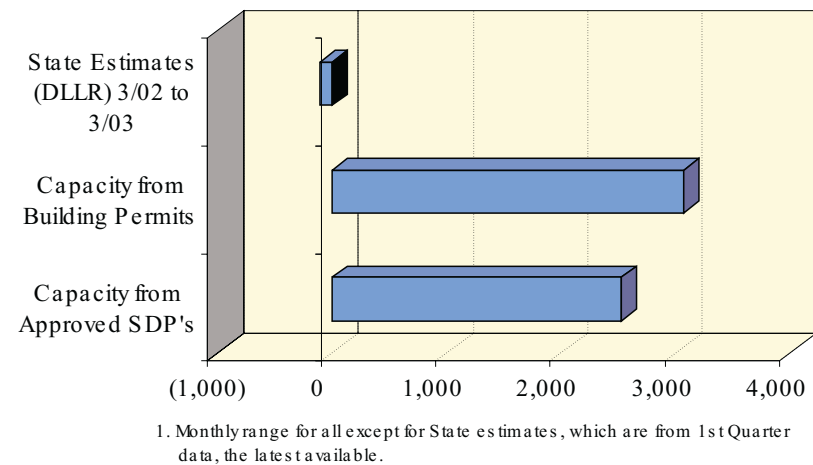


Chart 4
1-Year Job Growth, 10/1/02 to 9/30/03¹



ment plans and issued building permits compared to actual job growth based on estimates from the State Department of Labor, Licensing and Regulation (DLLR).

Potential employment growth from approved site development plans and building permits has been estimated based on information provided by the employer or as indicated on the plan. In some cases, calls were made to prospective employers. Where this information was not available a generalized ratio of employees to square footage was used. This ratio varies depending upon the category of non-residential use (retail, office/service, manufacturing/extensive industrial and government/ institutional).

The one-year job growth estimates from the State from first quarter 2002 to first quarter 2003 indicates that there were 107 jobs *lost* in Howard County. This is the first time this has occurred since 1991, during the last recession. Job growth as reported by the State over the five year period totals 22,503 new jobs. On average, this is a net gain of 4,501 new jobs per year reflecting the strong local and regional economies over this time period (with the exception of last year). It is anticipated that as the economy recovers, on an average annual basis from 2002 to 2003, there will be net job gains. There are signs of this already with decreasing nonresidential vacancy rates.

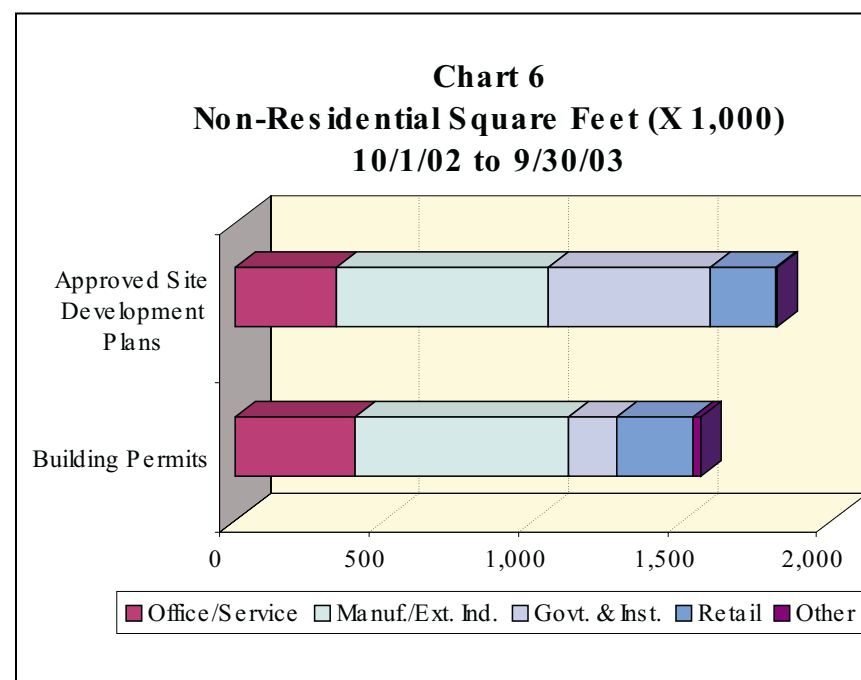
The *potential* jobs estimates from issued building permits and site development plans last year are 3,066 and 2,528 and new jobs, respectively. If the new building capacity from this development activity continues to be utilized and vacancy rates do in fact continue to decrease, this is an indicator that the County is poised to experience continued moderate job growth, at least over the short term.

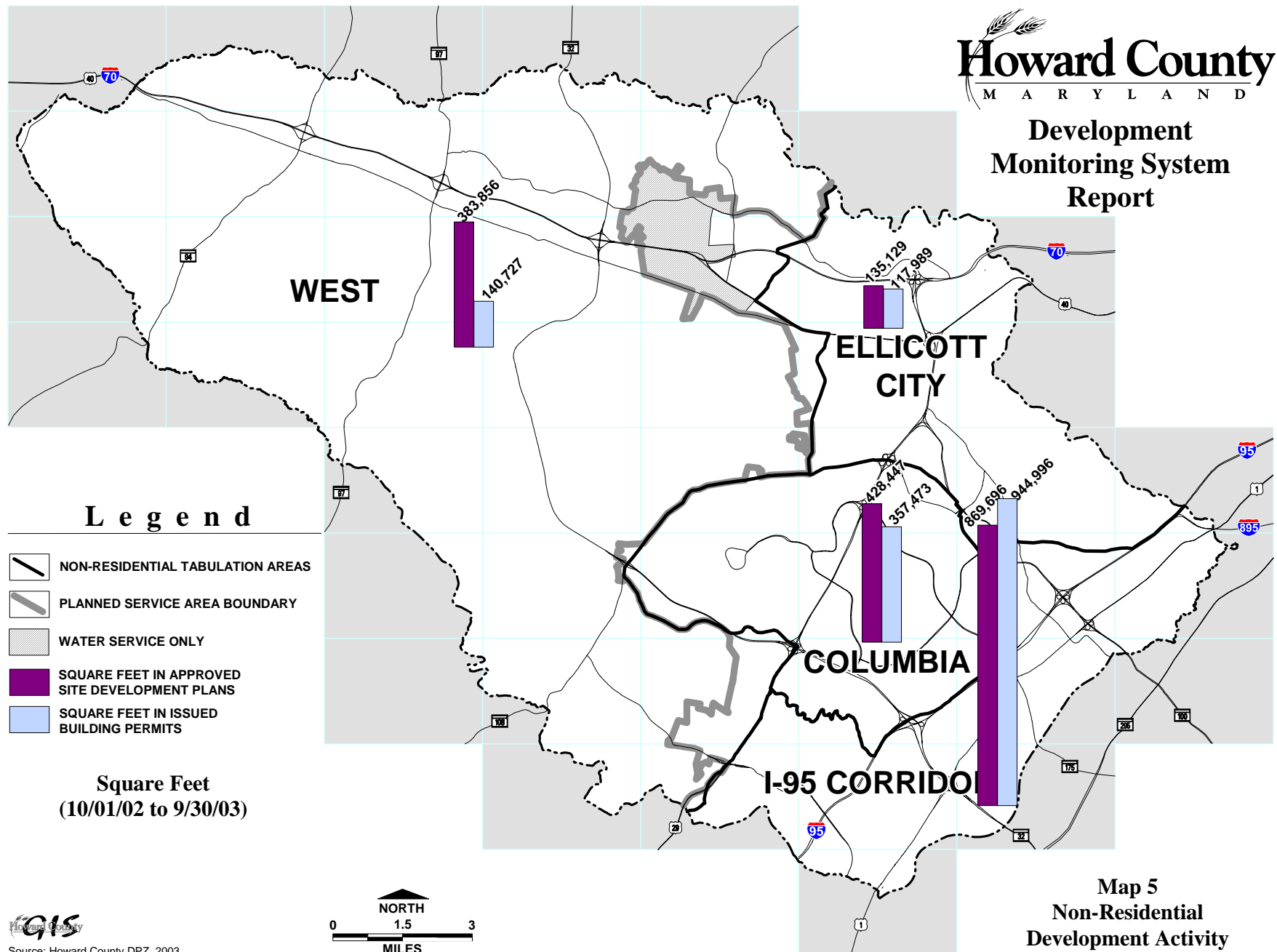
These current year job estimates are lower than they were last year, when it was estimated that there was potential for 3,144 and 3,148 new jobs from issued building permits and approved site development plans. This is reflective of the slowing economy during this time period, yet still shows that there has been continued development activity reflecting general confidence for a rebounding job market.

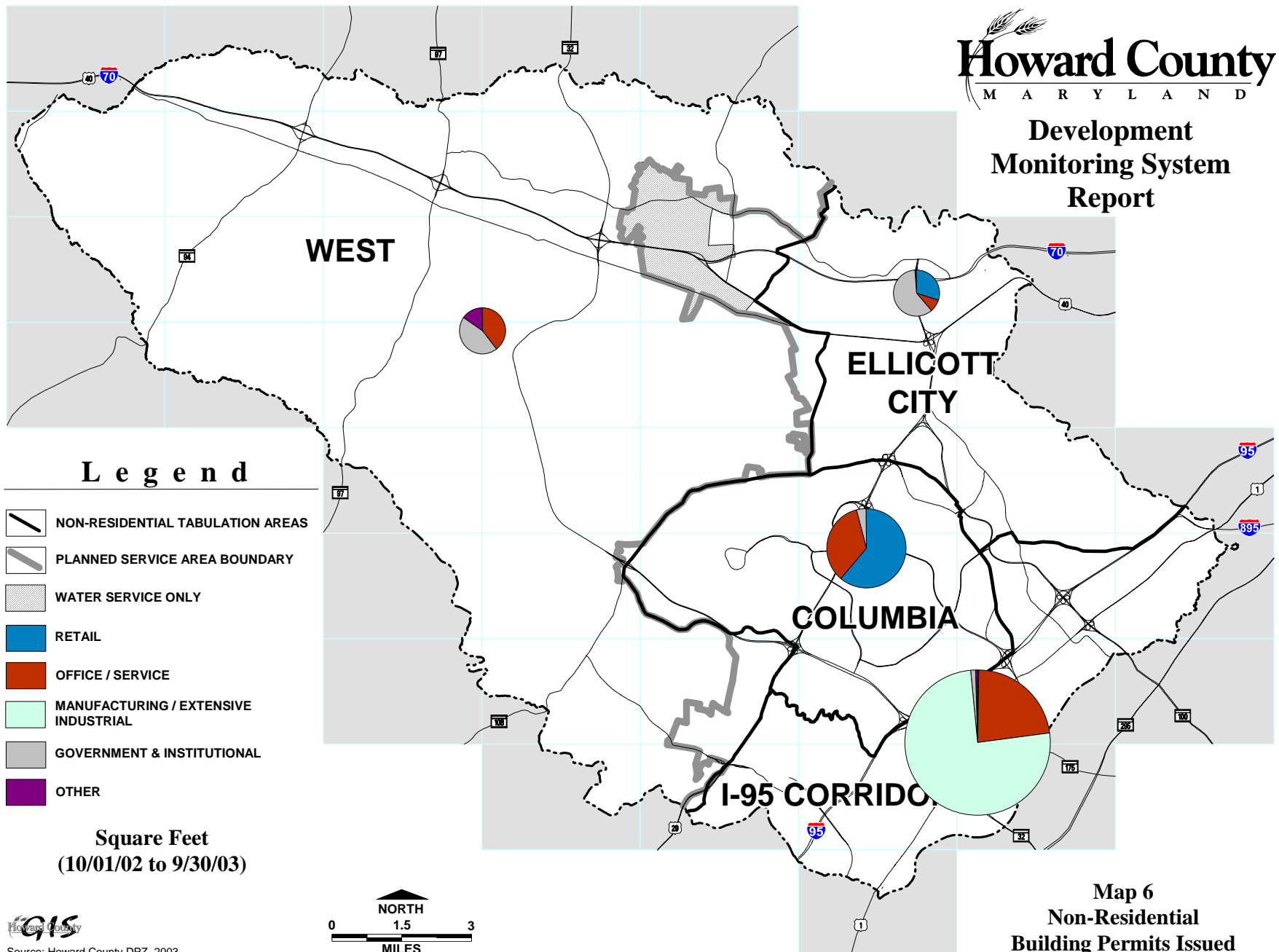
Development Activity

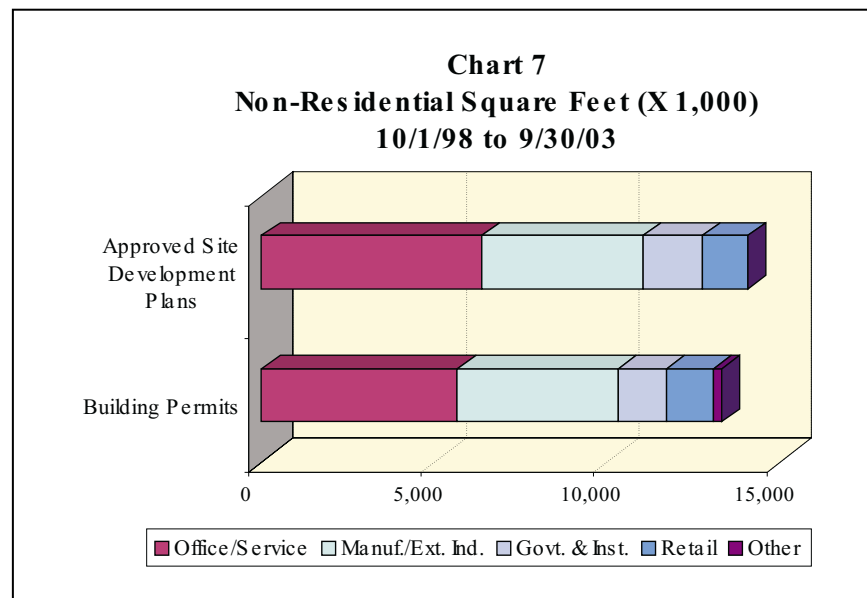
Last year, from October 1, 2002 to September 30, 2003, about 1.8 million square feet of building space were approved in site development plans. Building permits were issued for almost 1.6 million square feet. Most of the space was for manufacturing/extensive industrial space, followed by office/service space. Retail and governmental & institutional development were comparably less (Chart 6).

Chart 7 shows the results for the five year period from October 1, 1998 to September 30, 2003. During this time period about 14.0 million square feet were approved in site development plans and 13.3 million square feet in issued building permits. These represent averages of about 2.8 and 2.7 million square feet per year, respectively. Most of the new building space over the five years was for office/service uses closely followed by manufacturing/extensive industrial uses. Retail and government & institutional development were comparably less.









Development Location

Map 5 shows the one year total square footage by location for both building permits and approved site development plans. The map clearly indicates that most of the non-residential development activity has been concentrated in Columbia and the I-95 Corridor. Smaller amounts of non-residential development have occurred in Ellicott City and the West.

Map 6 shows the total square footage in issued building permits for the last year by type of development for each region. In addition to showing the building type breakdown in each region, the size of the pie charts also reflect the relative square footage in the issued permits. The overall Countywide square footage breakdown for permits issued last year is about 46 percent manufacturing/extensive industrial space, 26 percent office/service space, 16 percent retail space 10 percent government & institutional space and about 2 percent for other uses.

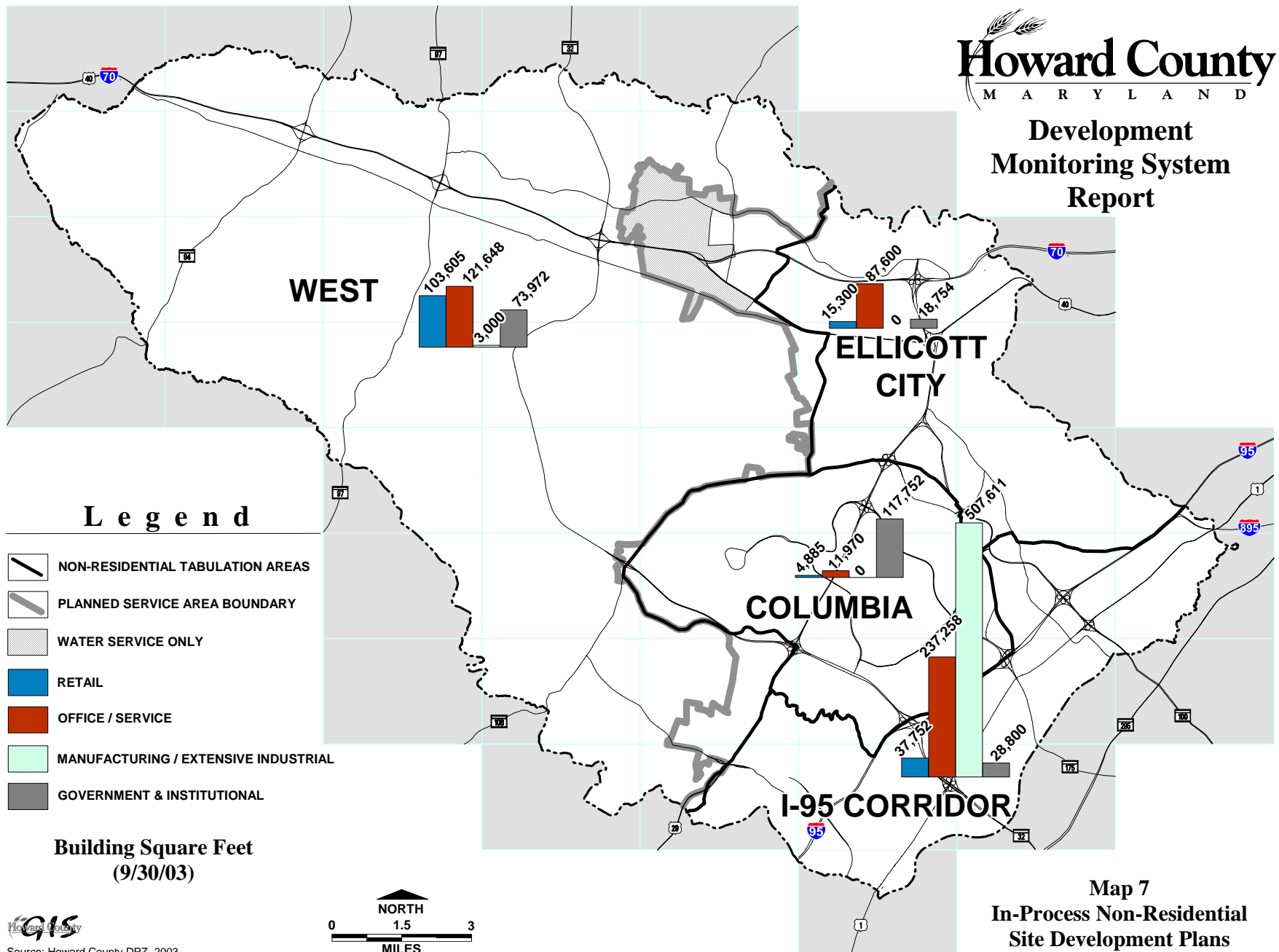
The map depicts how this varies by region with higher concentrations of office/service and retail space in Columbia and a higher concentration of manufacturing/extensive industrial uses in the I-95 Corridor.

Plans In Process

Map 7 shows the amount of non-residential building square footage in the site development plan process by location and by type of development. As of September 30, 2003, there was close to 1.5 million square feet in process. This compares to 1.7 million square feet in process for the previous year (as of September 30, 2002). The fact that a considerable amount of planned space is currently in process bodes well for future job growth in the County despite the effects of the recent recession.

Most of the in process-building space is in the I-95 Corridor. This is followed by planned space in the West, Columbia and Ellicott City, respectively.

Countywide, about 35 percent of the building space in the site development plan process is manufacturing/extensive industrial space. About 31 percent is office/service space and 16 percent government & institutional space. An additional 11 percent is retail space. The remaining 7 percent is for other uses.



Residential Development

Recorded Residential Subdivisions

The development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review (four buildable lots or less) involving only a final plan.

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units in the County, such as apartment buildings on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1998, the first year of this current DMS analysis period. Therefore, the number of recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential *plans* recorded, the number of potential *units* from recorded lots, and the *acreage* of plans recorded have been compiled by the planning areas shown on Map 8. Annual data for development activity are reported for the period October 1 through September 30.

Summary of Last Year's Result

Last year there were 1,251 housing units from recorded lots countywide in 160 subdivision plans totaling 3,093 acres (Table 1). Ellicott City had more almost half of the total units with 573, 46 percent of the total. The Southeast had 29 percent of the total with 367 units. The remaining 311 units were in Columbia, Elkridge and the Rural West planning areas. These represent *net new unit* potential and do not include total recordations from resubdivisions. For example, in a few cases resubdivisions combine existing lots to create a smaller number of new lots compared to the original.

Of the total 160 subdivision plans recorded last year, 42 percent were in the Rural West, followed by 24 percent in Ellicott City. The remaining 34 percent of plans were in Elkridge, the Southeast and Columbia. Note that the total plans include subdivisions and resubdivisions that do not necessarily create new unit potential, such as plats that revise lot lines or add easements.

Of the total 3,093 acres recorded, 2,387 acres, or about 77 percent, were in the Rural West. It should be noted, however, that of the 2,387 recorded acres in the West, 1,003 acres (42 percent) were for plats sending or receiving density as part of the density and cluster exchange subdivision process. Also, the recorded acres for all areas include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

Table 1
Recorded Residential Subdivisions, 10/01/02 to 9/30/03

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	20	2%	7	4%	16	1%
Elkridge	127	10%	15	9%	78	3%
Ellicott City	573	46%	39	24%	326	11%
Rural West	164	13%	67	42%	2,387	77%
Southeast	367	29%	32	20%	287	9%
TOTAL	1,251	100%	160	100%	3,093	100%

Table 2
Unit Potential from Recorded Lots by Unit Type, 10/01/02 to 9/30/03

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	20	0	0	0	20	2%
Elkridge	21	14	92	0	127	10%
Ellicott City	213	58	302	0	573	46%
Rural West	164	0	0	0	164	13%
Southeast	182	185	0	0	367	29%
TOTAL	600	257	394	0	1,251	100%
PERCENT	48%	21%	31%	0%	100%	

Chart 8
Recorded Lots by Unit Type - New Unit Potential
10/1/02 to 9/30/03

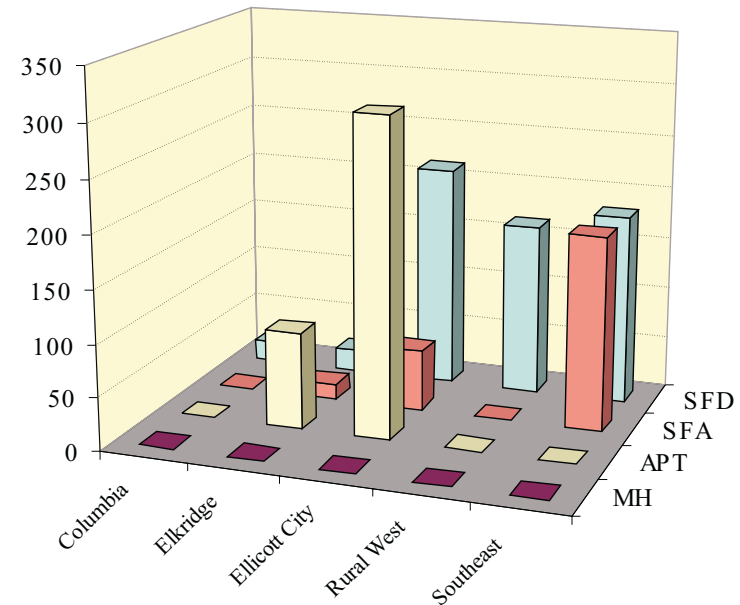


Table 2 shows new units from recorded lots by unit type. Of the 1,251 recorded lots, 600 are for single family detached units (SFD), 257 are for single family attached or townhouse units (SFA) and the remaining 394 are for apartment units. This represents 48, 21 and 31 percent of the total units, respectively. There were no mobile home units recorded last year. Chart 8 shows these results graphically.

Last Year's Projects - Greater than 30 Lots

Of the total 1,251 units from lots recorded last year, 934 or about 75 percent were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 3, are located in four of the five planning areas. The precise location of these plans are shown on Map 8.

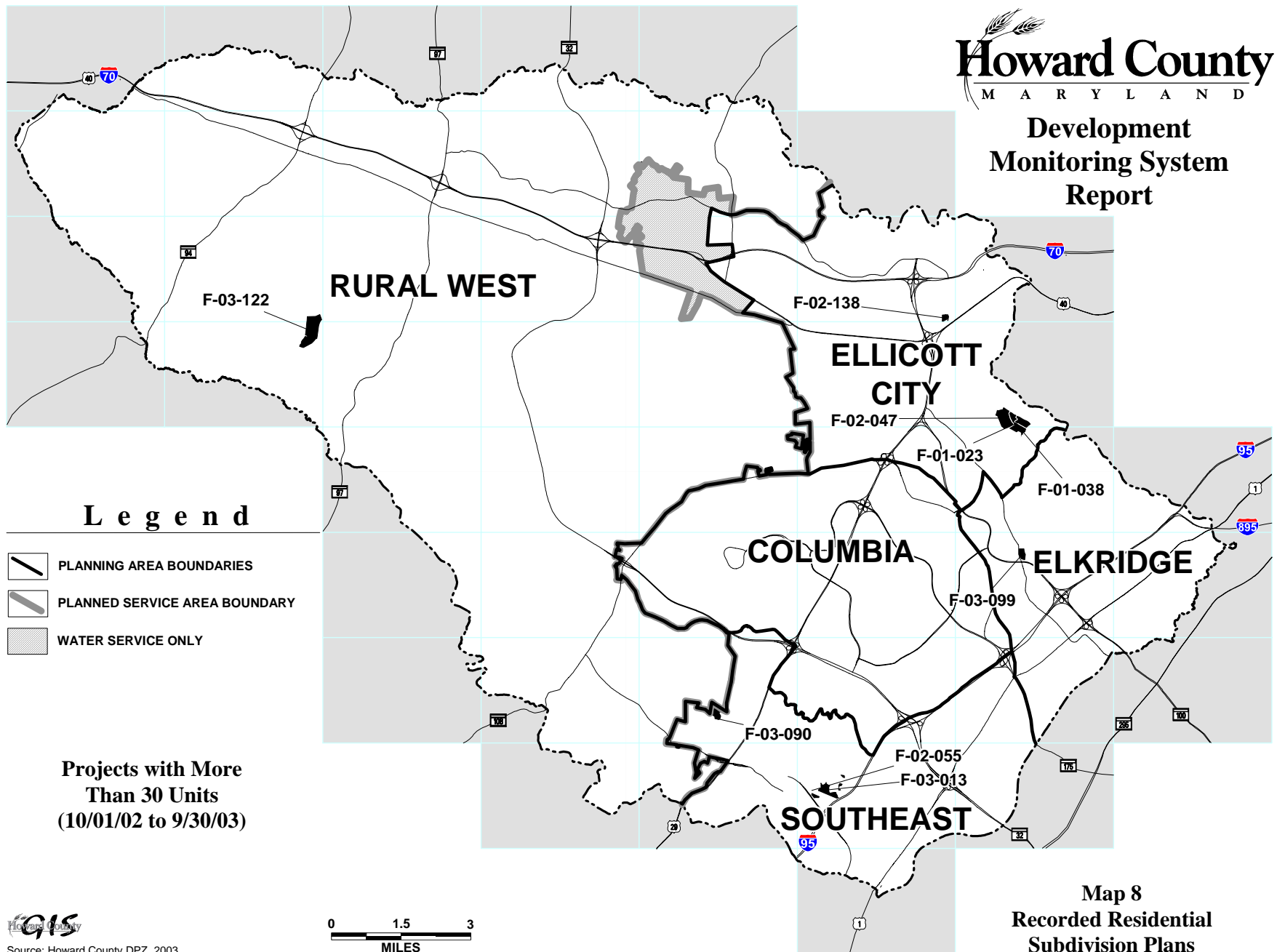


Table 3
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/02 to 9/30/03

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-03-099	The Courtyards at the Timbers	Age Restricted - APT	92	92
Ellicott City	F-02-047	Village Crest	Age Restricted - APT	267	437
	F-02-047	Village Crest	Age Restricted - SFA	51	
	F-01-023	Autumn View	SFD	46	
	F-01-038	Autumn View	SFD	38	
	F-02-138	Kaiser Farm	APT	35	
Rural West	F-03-122	Waterford Farms	SFD	45	45
Southeast	F-02-055	Emerson - Phase 3	SFA	120	360
	F-03-013	Emerson - Phase 4	SFD	120	
	F-03-090	Maple Lawn - Phase 2	SFA	65	
	F-03-090	Maple Lawn - Phase 2	SFD	55	
TOTAL					934

Most of the larger subdivisions were located in Ellicott City consisting of the Village Crest, Autumn View and Kaiser Farm developments, including 267 age-restricted apartments and 51 age-restricted townhouse units in Village Crest, 86 SFD units in nearby Autumn View and 35 apartment units in the latest phase of Kaiser Farm.

In the Southeast 360 units were part of the larger subdivisions of Emerson and Maple Lawn. In the Rural West there was one large subdivision, 45 lots as part of Waterford Farms. There was also one large subdivision in Elkridge, The Courtyards at the Timbers, consisting of 92 age-restricted apartment units.

Five Year Results

Table 4 shows the recorded subdivisions for the last five years from October 1, 1998 to September 30, 2003. Over this five year period lots for 5,569 units countywide in 789 subdivision plans totaling 15,107 acres were recorded. This equates to a five year average of 1,114 units per year. Note that the acreage figure represents all acreage on recorded plats including resubdivisions, sending and receiving preservation parcels, and recordations that do not add any new units such as recording for the purpose of adding easements or adjusting parcel lines.

Table 4
Recorded Residential Subdivisions, 10/01/98 to 9/30/03

Year	Units	Plans	Acreage
10/98 to 9/99	1,393	182	4,077
10/99 to 9/00	792	168	2,661
10/00 to 9/01	990	139	2,777
10/01 to 9/02	1,143	140	2,499
10/02 to 9/03	1,251	160	3,093
TOTAL	5,569	789	15,107
5 YEAR AVG.	1,114	158	3,021

Table 5 summarizes the number of units from recorded lots by unit type for each of the last five years. Over the last five years, recorded lots created the potential for 3,796 single family detached units, 68 percent of the total 5,569. A total of 1,281, 23 percent, were single family attached units and the remaining 492, 9 percent, were for apartments units. (As indicated earlier, these represent *net new unit* potential from recordations and do not include totals from resubdivisions.) Chart 9 is a graphical representation of recorded lots by unit type over the last five years.

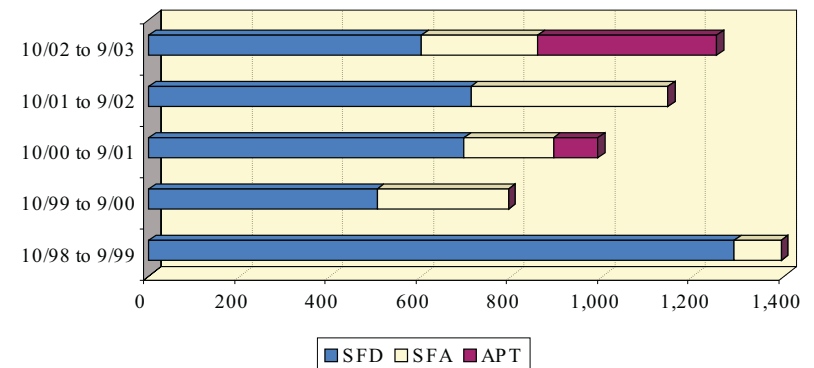
Table 5
Unit Potential From Recorded Lots by Unit Type, 10/01/98 to 9/30/03

Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	1,289	104	0	0	1,393
10/99 to 9/00	503	289	0	0	792
10/00 to 9/01	694	198	98	0	990
10/01 to 9/02	710	433	0	0	1,143
10/02 to 9/03	600	257	394	0	1,251
TOTAL	3,796	1,281	492	0	5,569
PERCENT	68%	23%	9%	0%	100%
5 YEAR AVG.	759	256	98	0	1,114

Last Year Compared to Five Year Trends

Last year resulted in the second largest number of new units from recorded lots with 1,251. This compares to 1,143, 990, 792 and 1,393 units for each of the 4 previous years, respectively, and is 137 units more than the 1,114 five year average.

Chart 9
Recorded Lots by Unit Type - New Unit Potential
10/1/98 to 9/30/03



In-Process Residential Subdivisions

As indicated in the previous section, the development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a minor subdivision review;
- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan.

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of September 30, 2003 are tabulated and compared with those in process a year earlier (as of September 30, 2002).

Number of Plans

Fifty-seven more residential plans were in process as of September 30, 2001 than there were one year earlier – 236 plans in 2003 compared to 179 plans in 2002 (Table 6).

For the current year, Ellicott City had the greatest number of residential plans in process with 73, followed by the Rural West with 58. Elkrigde and the Southeast had 47 and 40 plans in process, respectively. Columbia had 18 plans in process.

Of the 236 plans in process on September 30, 2003, 138 were final plans, 54 were sketch plans, 29 were preliminary equivalent sketch plans and 15 were preliminary plans.

Number of Potential Units

Similar to the number of plans, there were more potential units in process as of September 30, 2003 compared to a year earlier, 6,819 units compared to 6,776 units (Table 7). The Ellicott had the largest number of units in

Table 6
Number of Residential Subdivision Plans in Process, 09/30/03
(With comparisons to Countywide total as of 09/30/02)

Planning Area	Preliminary Equivalent				TOTAL PLANS
	Sketch	Sketch	Preliminary	Final	
Columbia	3	3	0	12	18
Elkrigde	14	0	6	27	47
Ellicott City	14	8	3	48	73
Rural West	13	13	3	29	58
Southeast	10	5	3	22	40
TOTAL	54	29	15	138	236
As of 09/30/02	41	20	25	93	179

process in 2003 with 2,701, or 40 percent, of the countywide total. This is followed by the Southeast with 1,855 units in process (27 percent). The Rural West, Columbia and Elkrigde planning areas had the remaining 2,263 units in process (33 percent). The large number of units in the Southeast are from the two large phased projects there, Maple Lawn and Emerson. Large projects in Ellicott City include Turf Valley, Waverly and Montjoy Farm.

It is important to note that a significant number of the 6,819 potential units in process are part of phased projects with building planned for future years. As shown in Table 8, 3,924 units are part of phased plans, with building planned as far out as 2014 (in the case of Maple Lawn). This represents 58 percent of the total units in process. Most of the phased projects are in the Southeast and Ellicott City. The larger phased projects include the Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties and Montjoy Farm in Ellicott City.

As reflected in Table 7, 45 percent of the units in process are single family detached units. About 23 percent are single family attached units and an-

other 32 percent are apartment units. Table 9 shows details by plan stage and unit type for this year by planning area. Chart 10 graphically illustrates the units in process by unit type for each planning area.

Table 7
Number of Potential Units from Subdivision Plans in Process, 09/30/03
(With comparisons to Countywide total as of 09/30/02)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	38	105	118	0	261
Elkridge	636	361	66	0	1,063
Ellicott City	655	532	1,514	0	2,701
Rural West	939	0	0	0	939
Southeast	805	564	486	0	1,855
TOTAL	3,073	1,562	2,184	0	6,819
PERCENT	45%	23%	32%	0%	100%
As of 09/30/01	3,074	1,554	2,148	0	6,776

Chart 10
Subdivisions in Process - New Unit Potential
9/30/03

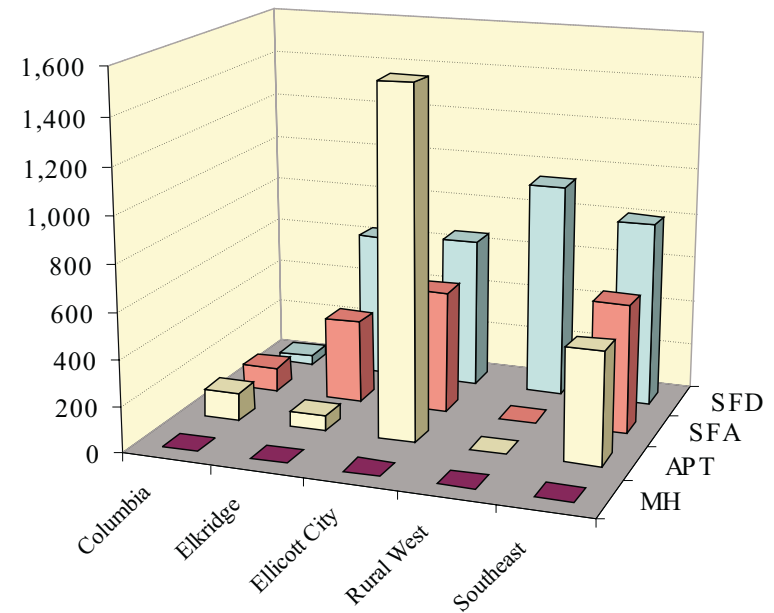


Table 8
Potential Units from Phased Projects

Planning Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0	0	0
Elkridge	230	130	0	0	0	0	0	0	0	0	0	360
Ellicott City	105	368	588	371	311	40	95	0	0	0	0	1,878
Southeast	54	300	290	240	220	155	100	75	75	45	41	1,595
Rural West	43	48	0	0	0	0	0	0	0	0	0	91
TOTAL	432	846	878	611	531	195	195	75	75	45	41	3,924

Note: Does not include phased project units on already recorded plats.

Table 9
Number of Potential Units from Subdivision Plans in Process by Unit Type, 09/30/03

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	6	105	118	0	229	28	0	0	0	28
Elkridge	160	82	66	0	308	110	0	0	0	110
Ellicott City	276	392	1,078	0	1,746	115	0	0	0	115
Rural West	445	0	0	0	445	275	0	0	0	275
Southeast	557	431	426	0	1,414	88	54	0	0	142
TOTAL	1,444	1,010	1,688	0	4,142	616	54	0	0	670

Planning Area	Preliminary					Final					TOTAL - 09/30/03				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	4	0	0	0	4	38	105	118	0	261
Elkridge	152	0	0	0	152	214	279	0	0	493	636	361	66	0	1,063
Ellicott City	35	0	42	0	77	229	140	394	0	763	655	532	1,514	0	2,701
Rural West	77	0	0	0	77	142	0	0	0	142	939	0	0	0	939
Southeast	128	79	60	0	267	32	0	0	0	32	805	564	486	0	1,855
TOTAL	392	79	102	0	573	621	419	394	0	1,434	3,073	1,562	2,184	0	6,819

Number of Acres

As of September 30, 2003 a total of 5,773 acres of residential land in were in the subdivision process. This is about 228 acres less than the previous year, at which time there were 6,001 acres in process (Table 10).

The most acreage in process was in the sketch plan phase (2,822 acres). The final plan stage had 1,398 acres in process and the preliminary equivalent sketch plan stage had 1,110 acres in process. There were also 443 acres at the preliminary plan stage.

Major Projects

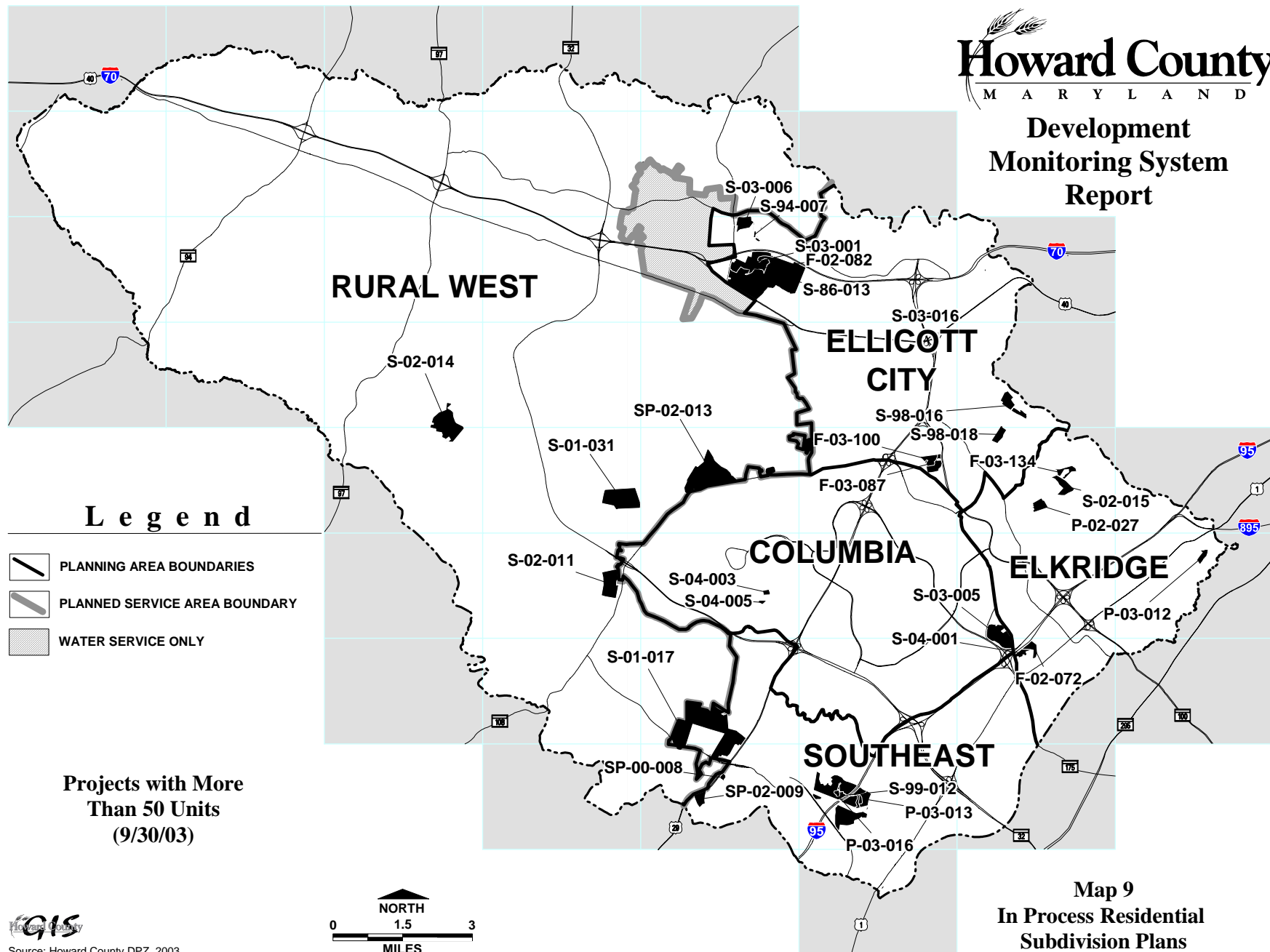
Table 11 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive or phased projects. Map 9 shows the location of these projects. Some of the larger projects in this list include the Emerson, Maple Lawn Farms, Turf Valley, Waverly Woods, the Oaks at Waters Edge and Montjoy Farm.

Table 10
Acreage of Residential Subdivision Plans in Process, 09/30/03
(With comparisons to Countywide total as of 09/30/02)

Planning Area	Preliminary Equivalent Sketch				TOTAL ACRES
	Sketch	Preliminary	Final		
Columbia	23	21	0	42	86
Elkridge	116	80	80	183	459
Ellicott City	973	69	28	286	1,356
Rural West	1,181	842	219	809	3,051
Southeast	529	98	116	78	821
TOTAL	2,822	1,110	443	1,398	5,773
As of 09/30/02	3,087	594	781	1,539	6,001

Table 11
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 09/30/03

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	S-03-005	Benson East	APT	100	229
	S-04-003	Cedar Villas	SFD, SFA - Age Restricted	74	
	S-04-005	Cedar Villas - Phase II	SFA, APT - Age Restricted	55	
Elkridge	F-02-072	The Oaks At Waters Edge	SFA	267	645
	S-04-001	Village Towns	SFA, APT	148	
	F-03-134	Cascade Overlook	SFD	70	
	S-02-015	Owens Property	SFD	55	
	P-03-012	Kuhn Property	SFD	53	
	P-02-027	Dennis Preserve	SFD	52	
Ellicott City	S-86-013	Villages at Turf Valley	APT	621	2,211
	F-03-087	Mont Joy	SFA, APT	362	
	S-03-006	The Courtyards at Waverly Woods - East	SFA, APT - Age Restricted	321	
	S-03-001	Villages at Turf Valley	SFA, APT	241	
	F-02-082	Oakmont at Turf Valley	APT	150	
	S-03-016	Hoenes Property	APT	144	
	S-94-007	Waverly - Phase VII	SFA	128	
	S-98-016	Autumn River	SFD, SFA	93	
	S-98-018	Worthington Fields	SFD	89	
	F-03-100	Mont Joy	SFD	62	
Rural West	S-01-031	Walnut Grove	SFD	93	307
	SP-02-013	Benedict Farm	SFD	84	
	S-02-014	The Warfields II	SFD	75	
	S-02-011	Turnbury Grove	SFD	55	
Southeast	S-01-017	Maple Lawn Farms	SFD, SFA, APT	909	1,572
	S-99-012	Emerson	SFD, SFA, APT	365	
	P-03-016	Emerson	SFA & APT - Age Restricted	93	
	P-03-013	Emerson	SFD	87	
	SP-02-009	Jamestown Landing	SFD	64	
	SP-00-008	Cherrytree Park - Phase III	SFA	54	
TOTAL					4,964



Approved Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Prior to amendments to the Subdivision and Land Development Regulations, effective January 8, 2002, SDPs were required only for all residential lots 20,000 square feet or less. The amended regulations now require site development plans for *all lots in the East*. Many lots in the West are larger than 20,000 square feet. Consequently, SDPs do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the five planning areas. The number of residential site development plans approved, the number of non-residential lots approved, and the acreage of approved plans have been compiled for each of these areas and are discussed below. The analysis includes last year's site development plan activity as well as activity for the last five years.

Summary of Last Year's Results

Last year there were 926 housing units approved in 98 site development plans totaling about 214 acres (Table 12). The Southeast had the most units approved with 402, or 43 percent of the total. ElkrIDGE had 27 percent of the total with 250 approved units, followed by Ellicott City with 141 approved units and the Columbia with 133 approved units. The Rural West had no units approved given the larger lot sizes which do not require site development plans.

Of the total 98 site development plans approved last year, 35 were in Ellicott City, followed by 29 in the Southeast and 20 in ElkrIDGE. The remaining 14 plans were in Columbia.

Of the total 214 residential acres approved through site development plans, 70 acres, or 33 percent, were in ElkrIDGE. A total of 64 acres were approved in the Southeast, followed by 61 acres approved in Ellicott City and 19 acres approved in the Columbia.

Table 13 shows new units from approved site development plans by unit type. Of the 926 approved units, 422 were for single family detached units, 312 were for single family attached or townhouse units, and the remaining 192 were for apartment units. This represents 46 percent, 34 percent, and 21 percent of the total units, respectively. There were no mobile homes approved in site development plans last year. Chart 11 shows these results graphically.

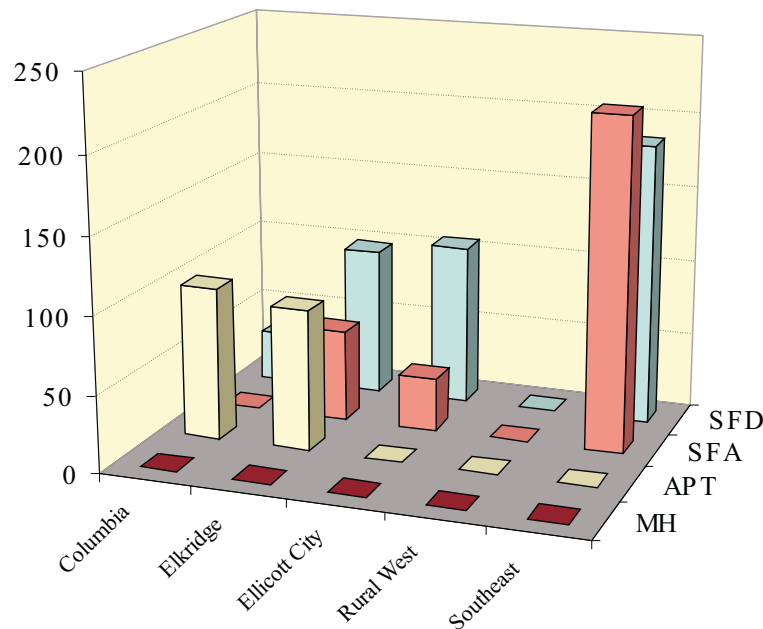
Table 12
Approved Residential Site Development Plans, 10/01/02 to 9/30/03

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	133	14%	14	14%	19	9%
ElkrIDGE	250	27%	20	20%	70	33%
Ellicott City	141	15%	35	36%	61	29%
Rural West	0	0%	0	0%	0	0%
Southeast	402	43%	29	30%	64	30%
TOTAL	926	100%	98	100%	214	100%

Table 13
Approved Units from SDP's by Unit Type, 10/01/02 to 9/30/03

Planning Area	SFD	SFA	APT	MH	TOTAL PERCENT	
Columbia	33	0	100	0	133	14.4%
ElkrIDGE	98	60	92	0	250	27.0%
Ellicott City	106	35	0	0	141	15.2%
Rural West	0	0	0	0	0	0.0%
Southeast	185	217	0	0	402	43.4%
TOTAL	422	312	192	0	926	100.0%
PERCENT	46%	34%	21%	0%	100%	

Chart 11
Units in Approved Site Development Plans
10/1/02 to 9/30/03



Last Year's Projects - Greater than 30 Units

Of the total 926 units approved in site development plans last year, 523 or about 57 percent were in site development plans consisting of more than 30 units. These larger projects, shown in Table 14, are located in four of the five areas – Columbia, Elkridge, Ellicott City and the Southeast. The location of these plans are shown on Map 10.

In Columbia, there was one large site plan, Parkview at Snowden River, containing 100 age restricted apartments. In Elkridge, 106 age restricted units were approved as part of the Courtyards at the Timbers and 45 SFD units were approved in Glyncheste Farms. In Ellicott City, the Courtyards of Ellicott Mills had 35 age restricted townhouses approved. In the Southeast, 237 units were part of larger site development plans. These include SFA and SFD units in Cherrytree Park and Emerson.

Five Year Results

Table 15 shows the approved residential site development plans for the last five years from October 1, 1998 to September 30, 2003. Over this five year period 6,829 units were approved countywide in 381 site development plans totaling about 1,352 acres. This equates to a five year average of 1,366 units per year. With only 926 approved units, last year had the smallest number of approved units of all five years, and substantially less than the 1,366 five year average.

Table 14
Approved Residential SDP's, Projects With More Than 30 Units, 10/01/02 to 9/30/03

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-03-142	Parkview At Snowden River	APT - Age Restricted	100	100
Elkridge	SDP-02-055	The Courtyards at the Timbers	SFA, APT - Age Restricted	106	151
	SDP-03-118	Glyncheste Farms	SFD	45	
Ellicott City	SDP-02-143	The Courtyards of Ellicott Mills	SFA - Age Restricted	35	35
Southeast	SDP-02-111	Cherrytree Park	SFD, SFA	84	237
	SDP-03-052	Cherrytree Park	SFA	32	
	SDP-03-128	Emerson	SFA	63	
	SDP-03-066	Emerson	SFD, SFA	58	
TOTAL					523

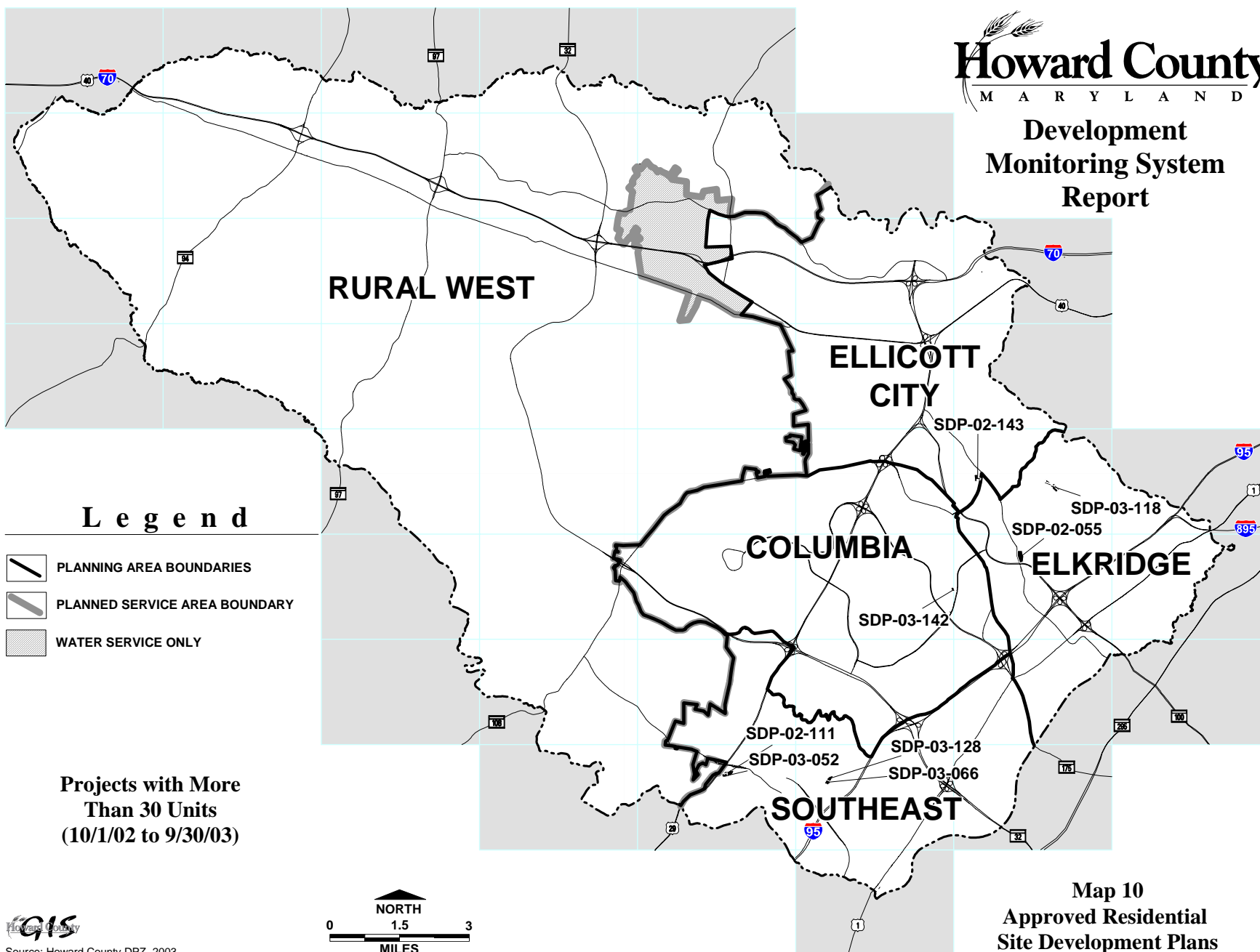


Table 16 shows the approved units by unit type for each of the last five years. Over the five year period, 49 percent of the units were single family detached, 24 percent were single family attached and 26 percent were apartments. The five year totals are 2,910, 1,438 and 1,555 for single family detached, single family attached and apartment units, respectively. Chart 12 shows these results graphically.

Table 15
Approved Residential Site Development Plans, 10/01/98 to 9/30/03

Year	Units	Plans	Acreage
10/98 to 9/99	1,772	89	368
10/99 to 9/00	1,565	56	233
10/00 to 9/01	959	61	178
10/01 to 9/02	1,607	77	359
10/02 to 9/03	926	98	214
TOTAL	6,829	381	1,352
5 YEAR AVG.	1,366	76	270

Chart 12
Housing Units in Approved SDP's, 10/1/98 to 9/30/03

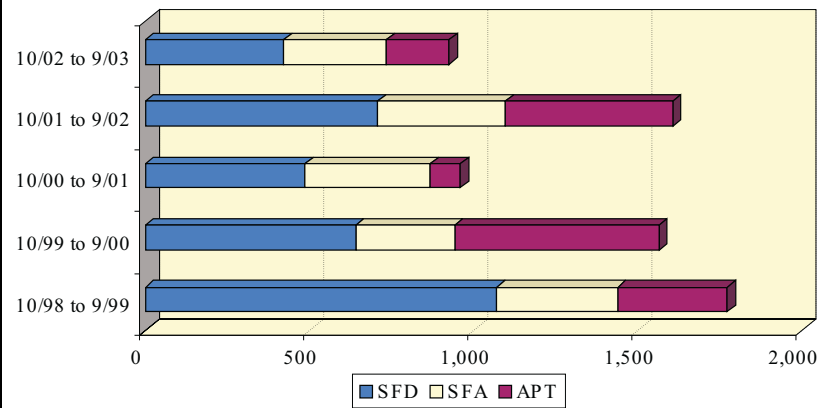


Table 16
Approved Units in Residential Site Development Plans, 10/01/98 to 9/30/03

Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	1,072	367	333	0	1,772
10/99 to 9/00	641	302	622	0	1,565
10/00 to 9/01	488	380	91	0	959
10/01 to 9/02	709	389	509	0	1,607
10/02 to 9/03	422	312	192	0	926
TOTAL	3,332	1,750	1,747	0	6,829
PERCENT	49%	26%	26%	0%	100%
5 YEAR AVG.	666	350	349	0	1,366

In Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of *plans*, potential *units* and *acreage* currently being processed as of September 30, 2003 are tabulated and compared to those in process a year earlier (as of September 30, 2002).

As indicated earlier, large residential lots 20,000 square feet or larger in the Rural West do not require site development plans. Therefore, the tables shown in this section do not include most units proposed in the West.

Number of Plans

There were more residential site development plans were in process as of September 30, 2003 compared to one year earlier, 61 plans compared to 47 plans (Table 17).

As of September 30, 2003, Ellicott City had 21 plans in process, followed by Elkridge with 18, the Southeast with 17 and Columbia with 4. There was only one plan in process in the Rural West, Homeland, an age-restricted development permitted as a conditional use.

Table 17
Number of Residential SDP's In Process, 09/30/02 & 09/30/03

Planning Area	2003	2002
Columbia	4	2
Elkridge	18	14
Ellicott City	21	20
Rural West	1	1
Southeast	17	10
TOTAL	61	47

Number of Potential Units

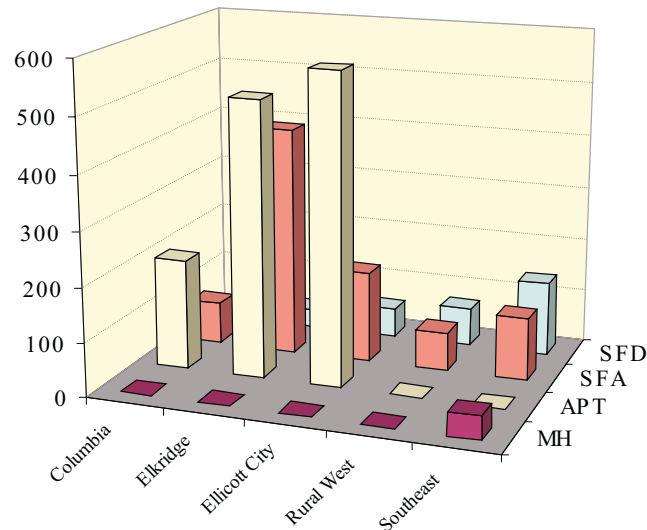
There were many more potential units in process as of September 30, 2003 compared to a year earlier, 2,489 units compared to 1,151 units (Table 18). Elkridge had the largest number of units in process in 2003 with 968, 39 percent of the countywide total. This is followed by Ellicott City and the Southeast with 794 (32 percent) and 295 (12 percent) units in process, respectively. Columbia had 289 units in process as of September 30, 2003 followed by 143 units in the Rural West.

As indicated in Table 18, the greatest number of units in process are for apartments with 1,285 proposed units in 2003. This is followed by 858 proposed single family attached or townhouse units. There were 303 proposed single family detached units and 43 mobile homes. Chart 13 graphically illustrates the units in process by unit type for the current year. (As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the table and chart would not include most units proposed in the West.)

Table 18
Number of Potential Units from Site Development Plans in Process, 09/30/03
(With comparisons to Countywide total as of 09/30/02)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	7	78	204	0	289
Elkridge	34	424	510	0	968
Ellicott City	54	169	571	0	794
Rural West	71	72	0	0	143
Southeast	137	115	0	43	295
TOTAL	303	858	1,285	43	2,489
As of 09/30/02	230	484	394	43	1,151

Chart 13
SDP's in Process - New Unit Potential
9/30/03



Number of Acres

As of September 30, 2003 a total of 331 acres of residential land were in the site development plan process. This is 63 acres more than the previous year, at which time there were 268 acres in process (Table 19).

Table 19
Acreage of Residential SDP's In Process, 09/30/03

Planning Area	2003	2002
Columbia	26	2
Elkridge	94	76
Ellicott City	83	82
Rural West	73	70
Southeast	55	38
TOTAL	331	268

The greatest amount of in process acreage was in the Elkridge, with 94 acres. There were 83 acres in process in Ellicott City, 73 acres in the Rural West, 55 acres in the Southeast and 26 acres in Columbia.

Major Projects

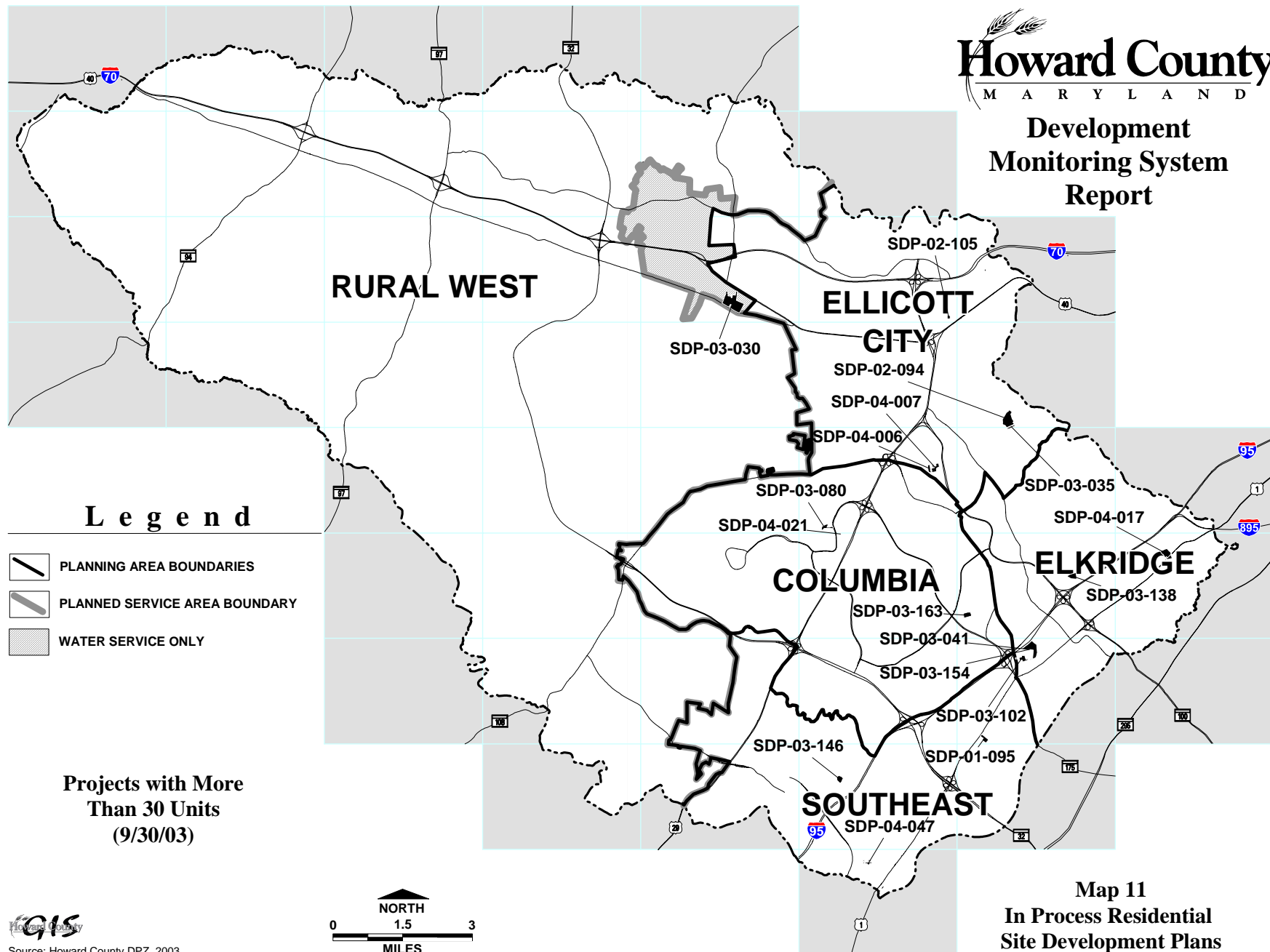
Table 20 shows a list of potential units from larger projects with 30 units or more. Map 11 shows the location of these projects. Of the 2,489 units in the site development plan process, 2,084 or about 84 percent were in projects with 30 units or more. More than half of the units in these larger projects, 1,205 units, are part of age-restricted developments.

Elkridge had 934 units in process as part of larger projects, followed by Ellicott City with 715, the Southeast with 166, the Rural West with 143 and Columbia with 126.

Larger projects in Elkridge include townhouse units in the Oaks at Waters Edge and Village Towns, and age-restricted apartments as part of the Mehta Property proposal and Centre 9500. Larger projects in Ellicott City include apartments and SFA units in Montjoy, age-restricted SFA and apartment units in Village Crest and apartment units in Kaiser Farm. Large projects in the Southeast include mobile homes in Brentwood Manor, SFA units in Emerson, and SFD units in North Laurel Park. Large projects in Columbia include age-restricted apartments in Town Center and at Kendall Overlook and some additional non-restricted apartments in Columbia Town Center. There are also 143 age-restricted SFA and SFD units in process in Homeland located in the Rural West.

Table 20
In Process Residential Site Development Plans, Projects With More Than 30 Units, 9/30/03

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-03-080	Town Center	APT - Age Restricted	156	126
	SDP-03-163	Kendall Overlook	SFA - Age Restricted	78	
	SDP-04-021	Columbia Town Center	APT	48	
Elkridge	SDP-03-138	Centre 9500	APT - Age Restricted	216	934
	SDP-04-017	Mehta Property	APT - Age Restricted	294	
	SDP-03-041	The Oaks at Waters Edge	SFA	192	
	SDP-03-102	Village Towns	SFA	157	
	SDP-03-154	The Oaks at Waters Edge	SFA	75	
Ellicott City	SDP-02-094	Village Crest	APT - Age Restricted	267	715
	SDP-04-007	Montjoy	APT	244	
	SDP-04-006	Montjoy	SFA	118	
	SDP-03-035	Village Crest	SFA - Age Restricted	51	
	SDP-02-105	Kaiser Farm	APT	35	
Southeast	SDP-03-146	Emerson	SFA	89	166
	SDP-01-095	Brentwood Manor Expansion	MH	43	
	SDP-04-047	North Laurel Park	SFD	34	
Rural West	SDP-03-030	Homeland	SFD, SFA - Age Restricted	143	143
TOTAL					2,084



Residential Building Permits & Use and Occupancy Permits

The final stage of the development process is the issuance of building permits. In Howard County, building permits are required for all construction. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by the five planning areas.

Issued Building Permits

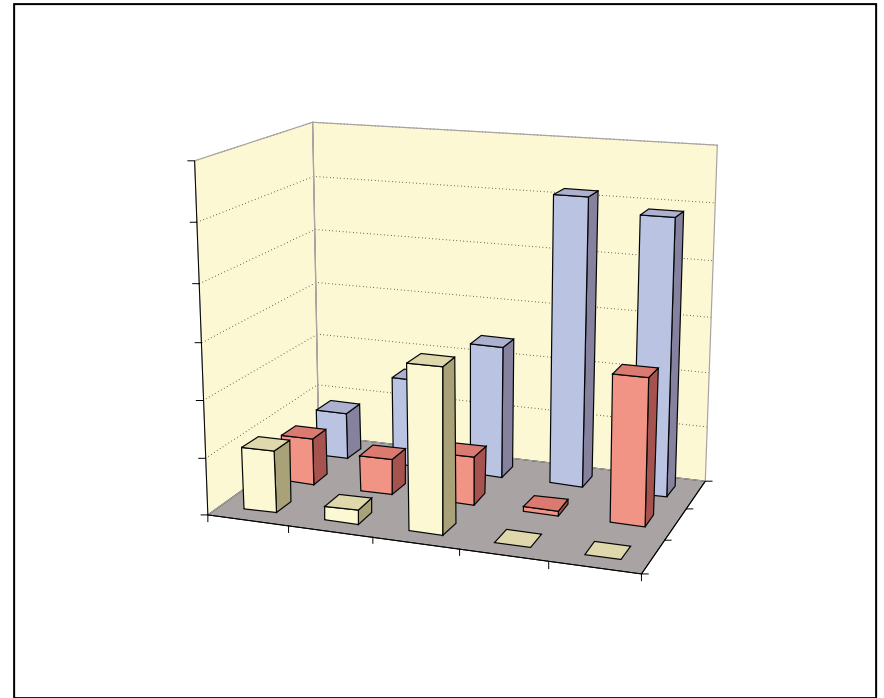
Summary of Last Year's Results

Last year from October 1, 2002 to September 30, 2003, the County issued 1,209 residential building permits for new construction (Table 21). Of all planning areas, the Southeast had the most building permits issued with 375, 31 percent of the total. Ellicott City had 306 issued permits (25%). The Rural West had 262 issued permits (22%). There were 140 issued permits in Columbia (12%) and 126 in Elkridge (10%).

Countywide, 62 percent of the permits were for single family units. About 21 percent were for SFA units and 17 percent for apartment units. The greatest number of SFD units were in the Rural West, followed by the Southeast. No permits for mobile homes were issued last year. Chart 14 shows these results graphically by planning area.

Table 21
Issued Residential Building Permits by Unit Type, 10/01/02 to 9/30/03

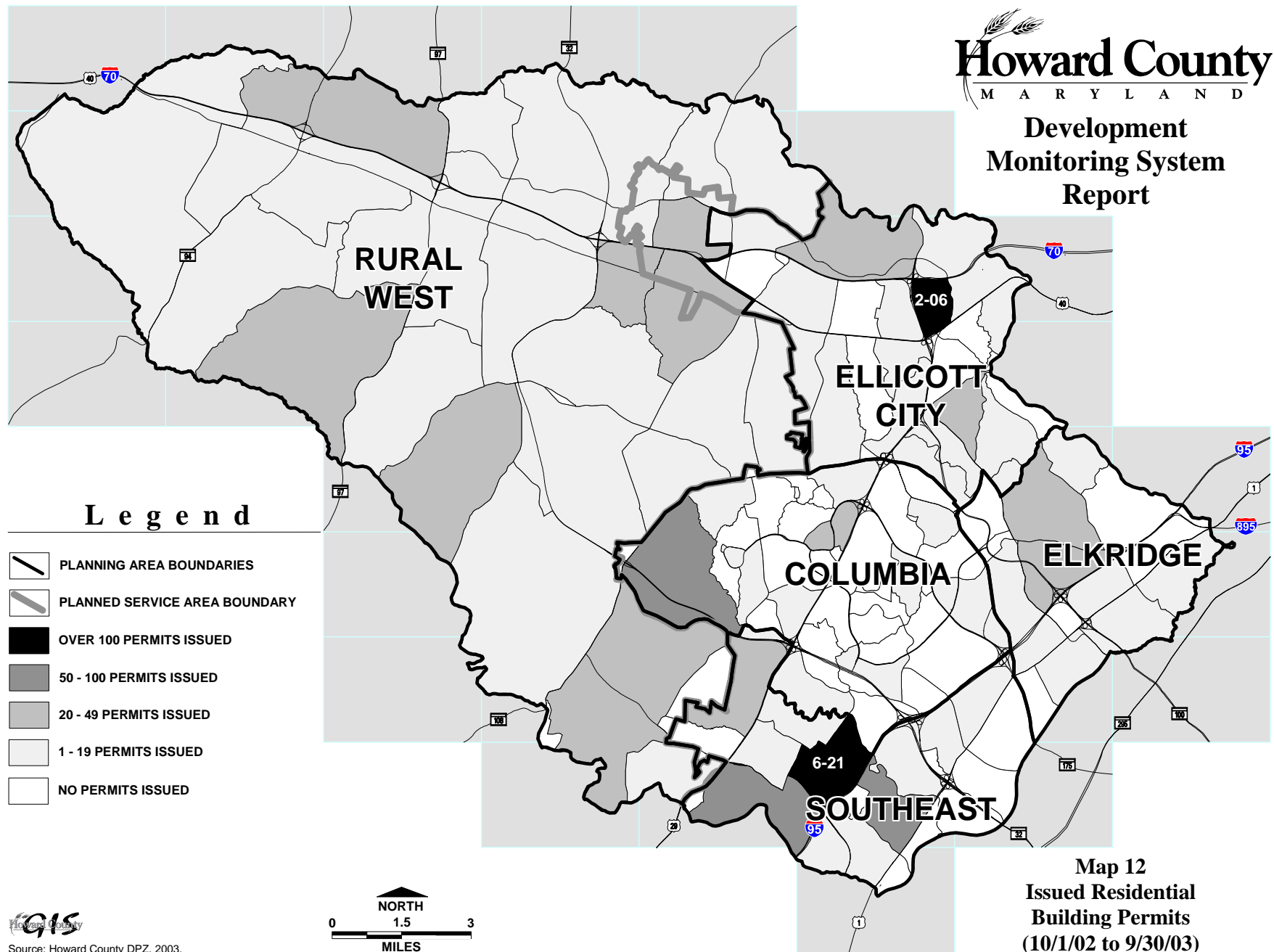
Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	43	42	55	0	140	12%
Elkridge	82	32	12	0	126	10%
Ellicott City	120	43	143	0	306	25%
Rural West	258	4	0	0	262	22%
Southeast	246	129	0	0	375	31%
TOTAL	749	250	210	0	1,209	100%
PERCENT	62%	21%	17%	0%	100%	



Map 12 shows the building permit activity by statistical area of the County. Statistical areas 2-06 and 6-21 each had more than 100 permits issued. These are the areas containing the Enclave at Ellicott Hills, Kaiser Farm and Emerson. Of these two areas, statistical area 2-06 had the greatest number with 184 issued permits. Statistical area 6-21 had 182 issued permits. The map indicates the activity in the remaining statistical areas for various ranges.

Last Year's Projects - Greater Than 30 Units

Table 22 summarizes the issued residential building permits in larger subdivisions with more than 30 units. About 40 percent, or 485 of the total 1,209 permits issued last year, fall into this category. Map 13 shows the locations of each of the subdivisions.



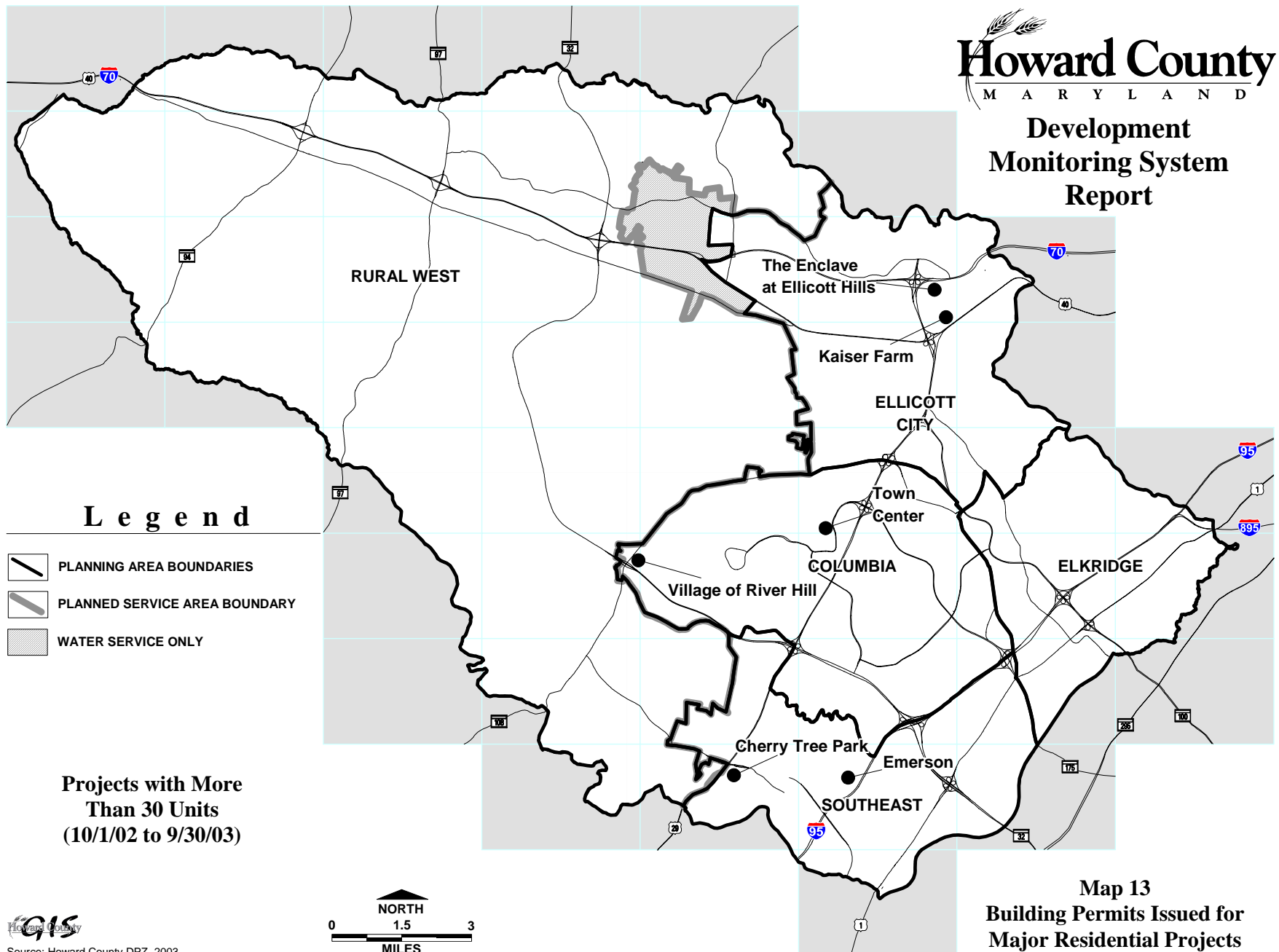


Table 22
Issued Residential Building Permits in
Subdivisions With More Than 30 Units, 10/01/02 to 9/30/03

Subdivision	Planning Area	Type	Units	TOTAL
The Enclave at Ellicott Hills	Ellicott City	APT	87	
Kaiser Farm	Ellicott City	APT	84	
Village of River Hill	Columbia	APT	55	226
Cherry Tree Park	Southeast	SFA	49	
Town Center	Columbia	SFA	42	91
Emerson	Southeast	SFD	168	168
TOTAL				485

Five Year Results

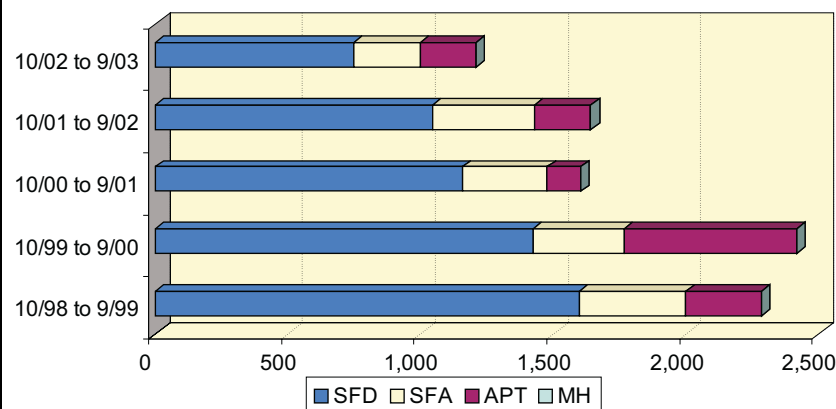
Over five years, from October 1, 1998 to September 30, 2003, a total of 9,157 residential building permits have been issued in Howard County (Table 23). This is an average of about 1,831 permits issued per year. The five year trend indicates recent decreases in the number of issued permits from a high of 2,418 in 99/00. Last year's number at only 1,209, was exactly half of the total issued in 99/00.

Of the 9,157 total permits issued over five years, 5,978, or 65 percent, were for single family detached units. There were 1,695 permits (19 percent) for single family attached units and 1,484 permits (16 percent) for apartment units. Chart 15 shows the results by unit type graphically over time.

Table 23
Issued Residential Building Permits by Unit Type, 10/01/98 to 9/30/03

Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	1,600	400	284	0	2,284
10/99 to 9/00	1,425	342	651	0	2,418
10/00 to 9/01	1,158	320	126	0	1,604
10/01 to 9/02	1,046	383	213	0	1,642
10/01 to 9/03	749	250	210	0	1,209
TOTAL	5,978	1,695	1,484	0	9,157
PERCENT	65%	19%	16%	0%	100%
5 YEAR AVG.	1,196	339	297	0	1,831

Chart 15
Issued Building Permits by Unit Type
10/1/98 to 9/30/03



Use and Occupancy Permits

Summary of Last Year's Results

Last year from October 1, 2002 to September 30, 2003, the County issued 1,397 use and occupancy permits (Table 24). Of all planning areas, Ellicott City had the most with 477, 34 percent of the total. This is followed by the Southeast with 307 issued use and occupancy permits. The Rural West had 263 issued permits, followed by Columbia and Elkridge with 215 and 135 issued permits, respectively. Chart 16 shows these results graphically.

Countywide, 67 percent of the permits were for single family units. About 17 percent were for single family attached units and 16 percent were for apartment units. No permits for mobile homes were issued last year.

Table 24
Issued Use and Occupancy Permits by Unit Type, 10/01/02 to 9/30/03

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	61	73	81	0	215	15%
Elkridge	118	17	0	0	135	10%
Ellicott City	258	78	141	0	477	34%
Rural West	263	0	0	0	263	19%
Southeast	240	67	0	0	307	22%
TOTAL	940	235	222	0	1,397	100%
PERCENT	67%	17%	16%	0%	100%	

Five Year Results

Over five years, from October 1, 1998 to September 30, 2003, a total of 9,791 use and occupancy permits have been issued in Howard County (Table 25). This is an average of about 1,958 permits per year.

Of the 9,791 total permits issued over five years, 6,355, or 65 percent, were for single family detached units. There were 1,828 permits (19 percent) for single family attached units, 1,608 permits (16 percent) for apartment units and no permits for mobile homes. Chart 17 shows the results by unit type graphically over time.

The number of issued permits has decreased from a high of 2,494 in 99/00 to 1,904 in 00/01 and 1,951 in 01/02, and then dropped significantly to 1,397 last year. This drop occurred for all unit types – single family detached, single family attached and apartment units – although there was a spike of 573 apartment units completed in 01/02.

Chart 16
Issued Use & Occup. Permits by Unit Type
10/1/02 to 9/30/03

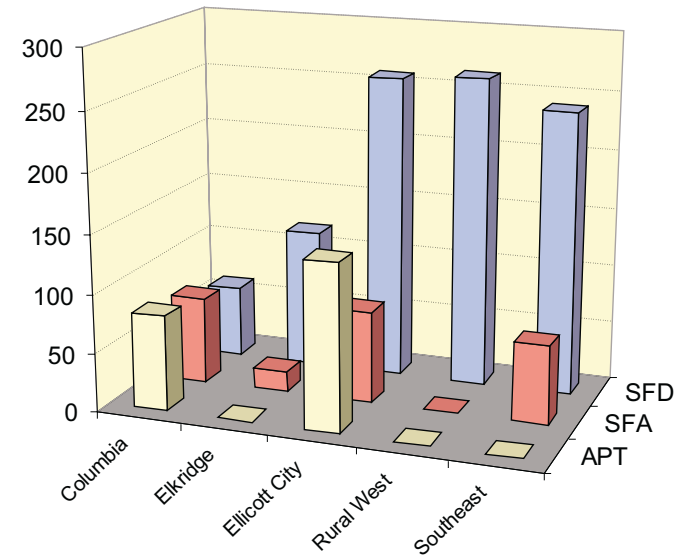
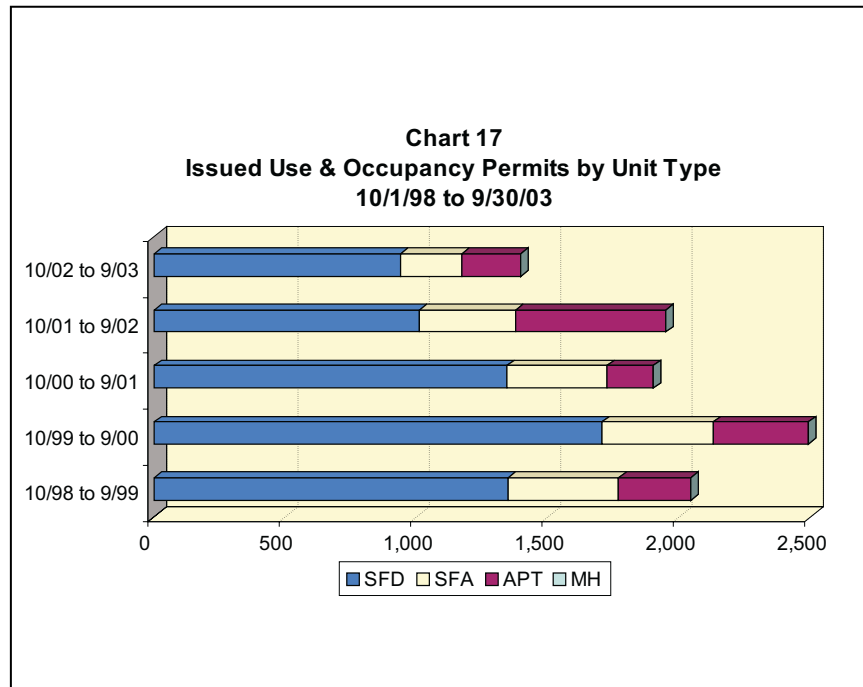


Table 25
Issued Use and Occupancy Permits by Unit Type, 10/01/98 to 9/30/03

Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	1,350	422	273	0	2,045
10/99 to 9/00	1,708	425	361	0	2,494
10/00 to 9/01	1,346	379	179	0	1,904
10/01 to 9/02	1,011	367	573	0	1,951
10/02 to 9/03	940	235	222	0	1,397
TOTAL	6,355	1,828	1,608	0	9,791
PERCENT	65%	19%	16%	0%	100%
5 YEAR AVE.	1,271	366	322	0	1,958



Housing Unit Allocations

Subdivision applications submitted after April 10, 1992 are subject to the Adequate Public Facilities Ordinance (APFO) and may require housing unit allocations. The typical time period between initial subdivision submission and occupancy is three years. Consequently, plan approvals after the chart adoption in 2003 are granted allocations for the 2006 allocation year. Some submissions contain phasing over several years and are granted allocations for future years, if available. The number of allocations available is established annually by County Council resolution. The allocation chart is based on the General Plan growth projections by planning area. Depending upon zoning and plan type, *tentative allocations* are usually assigned upon sketch plan approval. Allocations become *permanent* upon final plat recordation.

In accordance with APFO, since the 1997 allocation year (1994 plan submission year), the allocations have been adjusted to reflect regional development activity using a “rolling average.” The intent of the rolling average is to provide a means to annually adjust the allocation chart to achieve the overall General Plan targets. The rolling average formula uses: 1) the number of allocations granted, 2) the number of lots recorded in projects that were exempt from APFO, and 3) the General Plan target.

Table 26 is the current allocation chart, which the County Council adopted July 30, 2003. Total allocations are shown by the five planning areas in ad-

dition to a Senior East and a Route 1 overlay district. Senior east allocations are dedicated to age restricted housing in the eastern part of the County (consisting of all planning areas except the Rural West). Allocations for the Route 1 set-aside are reserved only for units in mixed use projects east of U.S. 95. Refer to the maps shown earlier in this report for an outline of the areas. From the July 30, 2003 chart adoption until the next chart adoption (planned for July 2004), the Department of Planning and Zoning may assign year 2006 allocations.

As allowed under APFO, to provide some flexibility, up to 20 percent more allocations than available can be granted in each planning area for the 2006 allocation year. If this is utilized and more allocations are granted than available for the current allocation year, then available allocations in future years are reduced based on the rolling average. Consequently, areas with strong demand show a decrease in available allocations over time. On the other hand, for areas that do not have strong demand available allocations increase over time.

As of October 24, 2003, 1,428 allocations had been granted for the 2006 Allocation Year (Table 27). For three planning areas -- ElkrIDGE, the Southeast and the Rural West -- all available allocations have been granted including the extra 20 percent. All additional projects in these planning areas are therefore placed in a waiting bin. As of October 24, 2003, all the

Table 26
Housing Unit Allocation Chart, Adopted July 30, 2003

Planning Area	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Columbia	612	499	344	220	220	158	158	158	158	158
ElkrIDGE	112	130	124	130	130	164	164	164	164	164
Ellicott City	321	323	345	348	348	358	358	358	358	358
Southeast	183	239	253	302	302	320	320	320	320	320
Rural West	198	204	254	250	250	250	250	250	250	250
Senior East	285	286	267	250	250	250	250	250	250	250
Route 1	250	250	250	250	250	250	250	250	250	250
TOTAL	1,961	1,931	1,837	1,750	1,750	1,750	1,750	1,750	1,750	1,750

other areas still had available capacity.

Comprehensive and phased subdivisions may request and receive allocations for future years. As of October 24, 2003 a total of 1,742 allocations have been granted for future years (Table 28). These future year allocations have been given to the following subdivisions: Bonnielass in Elkridge; Autumn River and Worthington Fields in Ellicott City; the Nordau Property, Emerson and Maple Lawn Farms in the Southeast; Benedict Farm, Homeland, the Shapiro Property and Windsor Forest Knolls in the Rural West; and Centre 9500 and Village Crest in the Senior East overlay area.

Table 27
Housing Unit Allocations, 2006 Allocation Year

Planning Area	Possible Allocations		Allocations Granted ¹	Remaining Available
	2006	+ 20%		
Columbia	612	734	148	586
Elkridge	112	134	134	0
Ellicott City	321	385	375	10
Southeast ²	183	220	294	(74)
Rural West	198	238	238	0
Senior East	285	342	239	103
Route 1	250	300	0	300
TOTAL	1,961	2,353	1,428	925

1. As of October 24, 2003

2. More allocations were given out than available in the Southeast in 2006 because previously phased projects were granted allocations prior to the adoption of the 2000 General Plan, which reduced future units. The rolling average provision in the APF Act will adjust future year allocations down over time to compensate.

Table 28
Granted Allocations for Future Years¹

Planning Area	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0
Elkridge	5	0	0	0	0	0	0	0	0	5
Ellicott City	59	40	40	15	0	0	0	0	0	154
Southeast	293	240	105	150	100	75	75	45	41	1,124
Rural West	181	0	0	0	0	0	0	0	0	181
Senior East	168	110	0	0	0	0	0	0	0	278
TOTAL	706	390	145	165	100	75	75	45	41	1,742

1. As of October 24, 2003

Potential Population

Table 29 shows the most recent household size estimates by unit type from the 2000 Census. They are also used for purposes of this analysis.

Table 29
Household Size by Dwelling Unit Type

Year	SFD	SFA	APT	MH
2000 Census Estimates	3.11	2.59	1.89	2.50

The development pipeline can be analyzed to project expected population growth from new development. As development progresses throughout the process, more exact population estimates based on dwelling unit type are possible. For this report, annual population growth has been estimated from potential housing units at three development stages: 1) recorded subdivisions, 2) issued building permits, and 3) issued use and occupancy permits. Table 30 summarizes the estimated population results from new growth for last year as well as the five year average.

Table 30
Comparison of Housing and Population Estimates

Category	10/02 to 9/03		10/98 to 9/03 (Annual Ave.)	
	Housing Units	Population	Housing Units	Population
Recorded Lots	1,251	3,273	1,114	3,207
Building Permits	1,209	3,370	1,831	5,152
U & O Permits	1,397	3,948	1,958	5,502

Based on recorded lots last year from October 1, 2002 to September 30, 2003, there is potential for 3,273 new residents. This compares to a potential population of 3,370 based on the number of issued building permits and an estimated population of 3,948 based on use and occupancy permits issued during the same one year time period.

Over the five year period from October 1, 1998 to September 30, 2003, average annual population growth based on recorded lots is 3,207. Population growth based on the number of issued building permits and use and occupancy permits amounts to 5,152 and 5,502 per year, respectively. More detailed results for each development category are discussed in the sections below.

As indicated earlier in this report, not all potential units go through the subdivision process, so building permits and use & occupancy permits are a more accurate measure of population growth.

Population Estimates from Recorded Subdivisions

Table 31 shows the potential population from recorded lots by unit type and by region for the 10/02 to 9/03 one year time period. Of the 3,273 potential new residents 57 percent will reside in single family detached units, 20 percent in single family attached units and 23 percent in apartment units. About 42 percent will live in Ellicott City, 32 percent in the Southeast, 16 percent in the Rural West. The remaining 10 percent will live in Elkridge and Columbia.

Table 31
Potential Population from Recorded Lots, 10/01/02 to 9/30/03

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	62	0	0	0	62	2%
Elkridge	65	36	174	0	275	8%
Ellicott City	662	150	570	0	1,382	42%
Rural West	510	0	0	0	510	16%
Southeast	566	478	0	0	1,044	32%
TOTAL	1,865	664	744	0	3,273	100%
PERCENT	57%	20%	23%	0%	100%	

For the five years since October 1, 1998, there has been a potential of 5,569 residential units from recorded lots. This averages 1,114 new units per

year. Using the household size estimates discussed above for each unit type, an estimated 16,037 new residents could live in those units (Table 32). This results in an average population growth rate of about 3,200 new residents per year.

Of the total 16,037 residents, 74 percent of the total population would reside in single family detached units. About 21 percent would live in single family attached units and 6 percent in apartment units.

Table 32 Potential Population from Recorded Lots, 10/01/98 to 9/30/03					
Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	4,006	269	0	0	4,274
10/99 to 9/00	1,563	747	0	0	2,310
10/00 to 9/01	2,157	512	185	0	2,853
10/01 to 9/02	2,206	1,119	0	0	3,326
10/02 to 9/03	1,865	664	744	0	3,273
TOTAL	11,796	3,312	929	0	16,037
PERCENT	74%	21%	6%	0%	100%
5 YEAR AVE.	2,359	662	186	0	3,207

Population Estimates from Issued Building Permits

Building permits are generally a more timely and accurate indicator of potential population than recorded lots in subdivision plans. Table 33 shows the potential population from building permits by type and by region for the 10/02 to 9/03 one year time period. Of the 3,370 new residents 69 percent would reside in single family detached units, 19 percent in single family attached units and 12 percent in apartment units. About 33 percent are located in the Southeast, 24 percent each in the Rural West, 22 percent in Ellicott City, 11 percent in Elkridge and 10 percent in Columbia.

For the five years since October 1, 1998, 9,157 building permits for new residential units have been issued. This averages 1,831 permits per year. Using the household size estimates discussed earlier for each unit type, an

Table 33 Potential Population from Building Permits, 10/01/02 to 9/30/03						
Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	134	109	104	0	346	10%
Elkridge	255	83	23	0	360	11%
Ellicott City	373	111	270	0	754	22%
Rural West	802	10	0	0	812	24%
Southeast	764	334	0	0	1,098	33%
TOTAL	2,328	646	396	0	3,370	100%
PERCENT	69%	19%	12%	0%	100%	

estimated 25,760 new residents would live in those units (Tables 34).

Of the total 25,760 residents, 72 percent of the total population would reside in single family detached units. About 17 percent would live in single family attached units and 11 percent in apartments.

Table 34 Potential Population from Building Permits, 10/01/98 to 9/30/03					
Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	4,972	1,034	536	0	6,542
10/99 to 9/00	4,428	884	1,229	0	6,541
10/00 to 9/01	3,598	827	238	0	4,664
10/01 to 9/02	3,250	990	402	0	4,643
10/02 to 9/03	2,328	646	396	0	3,370
TOTAL	18,577	4,382	2,801	0	25,760
PERCENT	72%	17%	11%	0%	100%
5 YEAR AVE.	3,715	876	560	0	5,152

Population Estimated from Use and Occupancy Permits

Use and occupancy permits are the most accurate and immediate predictor of new population. A use and occupancy permit is issued upon completion of a residential unit and is required prior to residents moving in.

Table 35 shows the potential population from use and occupancy permits by type and by region for the 10/02 to 9/03 one year time period. Of the estimated 3,948 new residents 74 percent live in single family detached units, 15 percent in single family attached units and 11 percent in apartment units. About 32 percent live in the Ellicott City, 23 percent in the Southeast, 21 percent in the Rural West, 13 percent in Columbia and 10 percent in Elkrige.

For the five years since October 1, 1998, there have been 9,791 use and occupancy permits issued. This averages 1,958 per year. Using the household size estimate discussed above, an estimated 27,509 new residents could live in those units (Table 36).

Of the total 27,509 new residents, about 72 percent of the total would reside in single family detached units. About 17 percent would live in single family attached units and 11 percent in apartments.

Table 35
Potential Population from Use & Occupancy Permits, 10/01/02 to 9/30/03

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	190	189	153	0	531	13%
Elkrige	367	44	0	0	411	10%
Ellicott City	802	202	266	0	1,270	32%
Rural West	817	0	0	0	817	21%
Southeast	746	173	0	0	919	23%
TOTAL	2,921	608	419	0	3,948	100%
PERCENT	74%	15%	11%	0%	100%	

Table 36
Potential Population from Use & Occupancy Permits, 10/01/98 to 9/30/03

Year	SFD	SFA	APT	MH	Total
10/98 to 9/99	4,195	1,091	515	0	5,801
10/99 to 9/00	5,308	1,099	681	0	7,088
10/00 to 9/01	4,183	980	338	0	5,500
10/01 to 9/02	3,142	949	1,082	0	5,172
10/02 to 9/03	2,921	608	419	0	3,948
TOTAL	19,748	4,726	3,035	0	27,509
PERCENT	72%	17%	11%	0%	100%
5 YEAR AVE.	3,950	945	607	0	5,502

Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from October 1, 2002 to September 30, 2003 have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 37). The data is graphically represented in Charts 18, 19, and 20.

The cost of housing in Howard County has been increasing steadily, from a

mean sales price of \$205,013 in 98/99 to \$295,592 last year for all housing types combined. This is an overall increase of 44.2 percent over the four year time period and an average annual increase of about 9.6 percent.

Most of this increase is reflected in the cost of single family detached homes, with the mean price increasing by about \$139,373 from \$257,305 four years ago to \$396,678 last year, a 54 percent increase. About 34 percent of this increase has occurred in the last year alone and almost 60 percent of the increase has occurred in the last two years.

For single family attached units there has been about a 45 percent increase in the mean sales price over the four year time period. Two-thirds of this

Table 37
Housing Sales by Type, 10/01/98 to 9/30/03

10/98 to 9/99			
Unit Type	# of Sales	Mean	Median
Condo	492	\$113,137	\$110,107
MF	0	\$0	\$0
SFA	1,643	\$140,356	\$136,000
SFD	2,896	\$257,305	\$235,452
TOTAL	5,031	\$205,013	

10/00 to 9/01			
Unit Type	# of Sales	Mean	Median
Condo	576	\$103,835	\$89,900
MH	7	\$90,629	\$88,500
SFA	2,006	\$161,115	\$155,000
SFD	2,889	\$315,499	\$294,990
TOTAL	5,478	\$236,421	

10/02 to 9/03			
Unit Type	# of Sales	Mean	Median
Condo	792	\$137,905	\$129,000
MH	5	\$83,860	\$88,900
SFA	1,943	\$203,347	\$195,000
SFD	3,019	\$396,678	\$373,650
TOTAL	5,759	\$295,592	

10/99 to 9/00			
Unit Type	# of Sales	Mean	Median
Condo	432	\$100,702	\$89,900
MH	1	\$79,900	\$79,900
SFA	1,758	\$145,863	\$139,900
SFD	3,010	\$291,510	\$276,418
TOTAL	5,201	\$226,390	

10/01 to 9/02			
Unit Type	# of Sales	Mean	Median
Condo	742	\$112,671	\$100,000
MH	5	\$57,879	\$63,000
SFA	2,355	\$183,382	\$176,500
SFD	3,146	\$348,344	\$325,000
TOTAL	6,248	\$257,946	

increase has occurred over the last two years. Condominiums have increase by 22 percent over the four years.

During this period the number of annual sales have also increased each year, except the last, from 5,031 sales in 98/99 to 6,248 sales in 01/02, dropping to 5,759 sales in 02/03. These data reflect both new and existing units combined. The drop in sales last year reflects the decrease in new construction.

Nationally and regionally, the housing market has been strong over the last several years. Howard County is no exception. For Howard County in particular, it has been indicated by local builders and real estate agents that recent demand has exceeded supply, which has significantly contributed to the price increases. Low mortgage rates have also contributed.

Map 14 shows the housing sales by zip code in the County. Both the number of sales and the mean sales prices are shown.

Chart 19
Median Sales Price by Unit Type

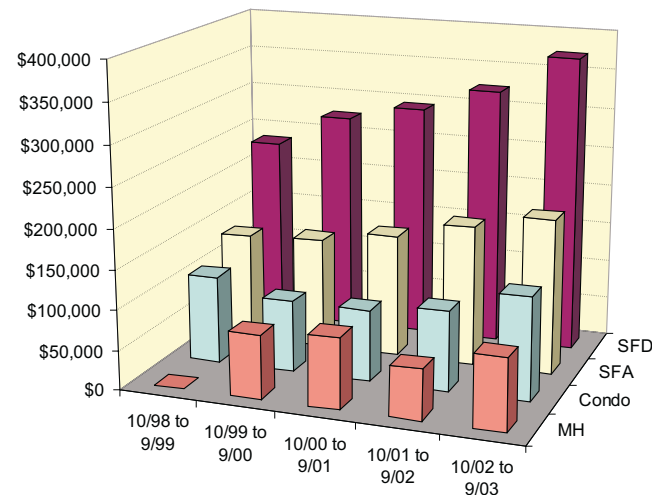


Chart 18
Mean Sales Price by Unit Type

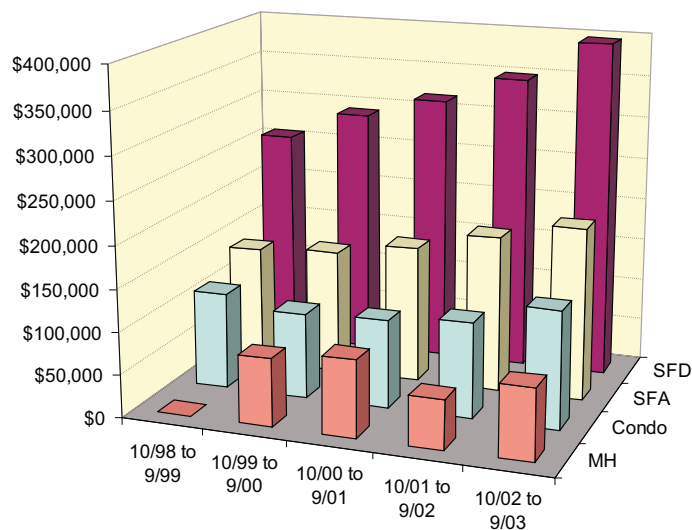
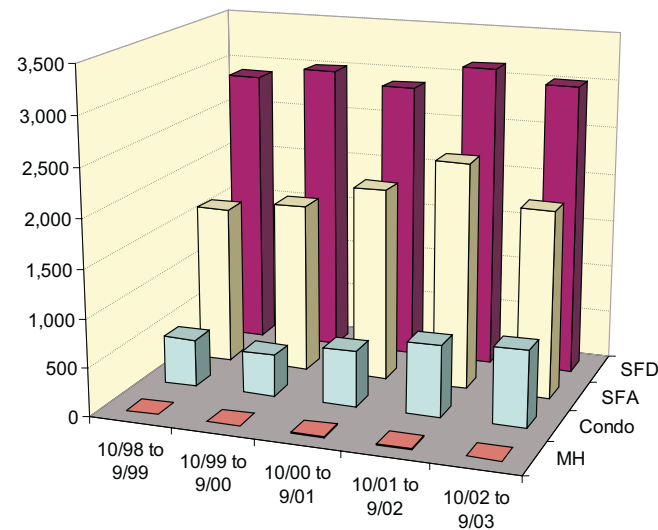
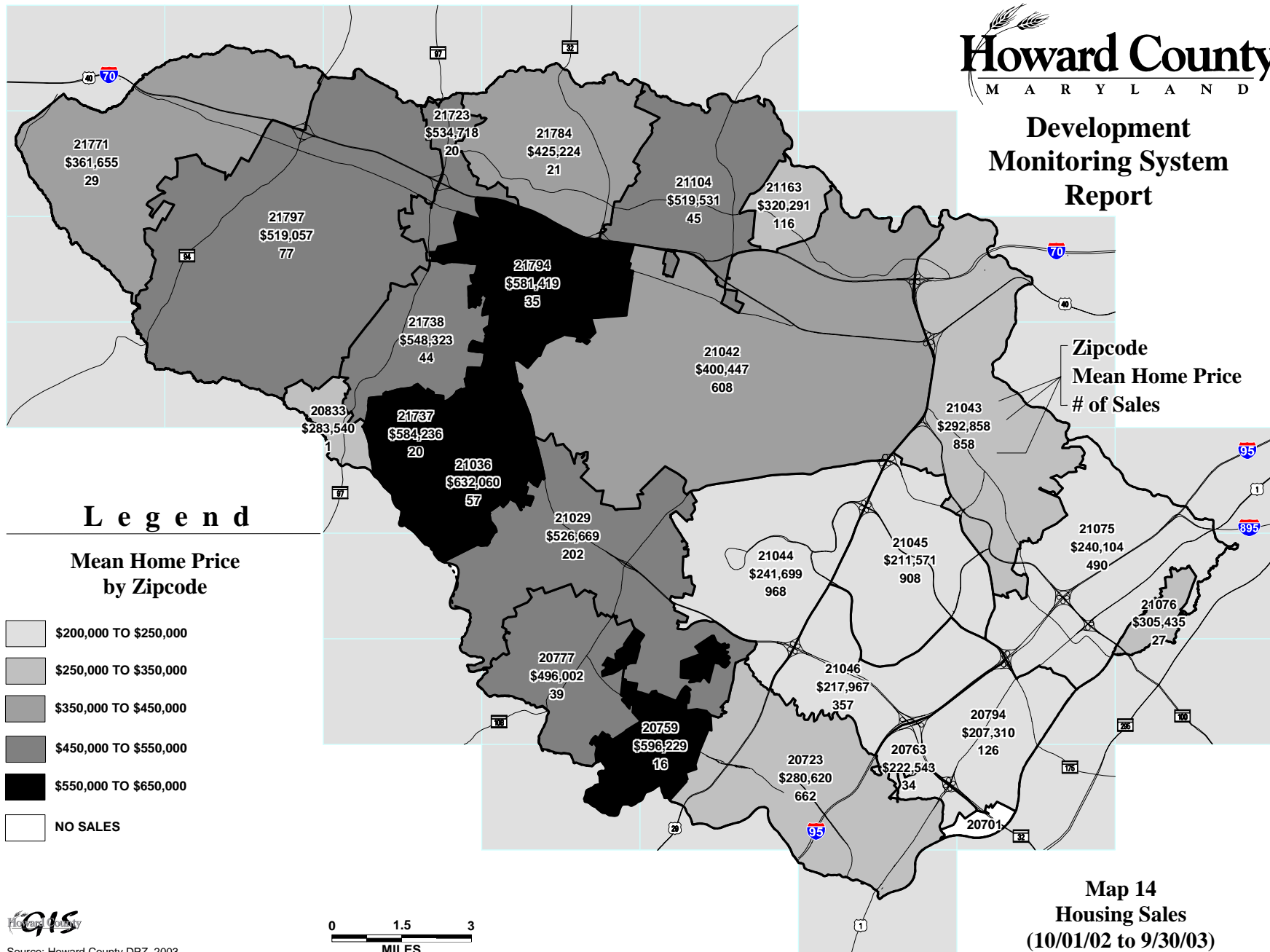


Chart 20
Number of Sales by Unit Type





Development Monitoring System Report



Rural Land Preservation

Agricultural Land Preservation Program

Howard County's Agricultural Land Preservation Program (ALPP) has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the purchase of easements where a farmer can voluntarily choose to sell a perpetual easement to the County while holding a fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

Agricultural land preservation in the County first began in 1979 using the State's easement purchase program, known as the Maryland Agricultural Land Preservation Foundation (MALPF). The County instituted its own easement purchase program, indicated above, in 1984 and until 1988 both the State and County programs were active in preserving farmland. In 1989 the County initiated the innovative Installment Purchase Agreement (IPA) program to purchase easements and local interest in the State program ended. Landowner interest in the State program was renewed in Fiscal Year 2001 based on changes to the MALPF valuation formula and purchase options. Last year, the State Board of Public Works approved purchase of an easement on 15.29 acres at a price of \$8,322 per acre. The settlement of this property occurred at the end of 2002. Two additional properties were placed in State preservation districts (the first step toward purchase of easements) in 2002, with easement purchases targeted for FY 2004.

The County's IPA program reached its \$55 million authorization limit in Fiscal Year 1997 and the program was temporarily suspended until Spring 2000 when the County Council authorized an additional \$15 million in IPA commitments. In June 2001, the County purchased easements on 400.5 acres at a price of \$2.48 million. In FY 2002 the County Council approved the acquisition of easements on five farms totaling about 350 acres for \$2.02 million, but none of these properties have yet been acquired. A large portion of one of these properties, however, was dedicated to the Howard County ALPP through the subdivision process as a density sending parcel (explained further below). Recently, in November 2003, the maximum

purchase price for land to join the IPA program increased from \$7,200 to \$20,000 per acre. The goal of this authorized spending level increase is to make the IPA program more competitive given the increasing land prices in the Rural West.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

During the latest one year reporting period, an additional 127 acres of agricultural preservation parcels were created in subdivisions through the development process and were enrolled in the Agricultural Land Preservation Program.

As of September 30, 2003, there were 18,947 acres of permanently preserved agricultural land. This includes 13,224 acres of purchased easements through the County's PDR Program, 3,910 acres of purchased easements by the State and 1,813 preservation acres dedicated as part of the development process (Table 38).

Table 38
Agricultural Preservation Easements, September 30, 2003

Type	Acres	Percent
County Purchased Agric. Easements	13,224	70%
State Purchased Agric. Easements	3,910	21%
Dedicated Agric. Preservation Parcels	1,813	10%
TOTAL	18,947	100%

Rural Easement Dedication

As previously indicated, last year 127 acres of agricultural preservation parcels were created through the development process and were enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 1,813 acres.

Besides agricultural easements, there are additional ways parcels are preserved through the development process. Last year, 313 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels, the only other preservation category that received additional acreage. Table 39 shows the land preservation totals from dedicated easements to date including land preserved in the Agricultural Land Preservation Program, as well as joint Howard County/Homeowner's Association parcels and other easement types.

Since 1992, preservation easements on 6,235 acres have been created by cluster development and the Density/Cluster Exchange Options. Including open space, the total comes to 6,598 acres.

The majority of the total dedicated preservation easements, 3,852 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 1,813 acres are held by the Howard County Agricultural Land Preservation Program. About 440 acres are jointly held by the Howard County Conservancy and Howard County. The remaining 130 acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society.

Table 39 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 9,271 acres have been subdivided in the rurally zoned land in the West. About 29 percent of this total, or 2,673 acres, is used for the development of residential lots and road right of ways. The remaining 71 percent, or 6,598 acres, is land in dedicated preservation easements and open space as described earlier. Of the 2,673 acres for residential development, about 525 acres are yet undeveloped, 1,906 acres are developed and 242 acres are for roads.

Preservation easements in the Rural West discussed above total 23,369

Table 39
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	253	325	
Undeveloped Lots (From Density Transfer)	182	200	
Total Undeveloped Lots	435	525	
Developed Lots (By Right)	1,189	1,373	
Developed Lots (From Density Transfer)	507	533	
Total Developed Lots	1,696	1,906	
Roadway		242	
TOTAL	2,131	2,673	28.8%
Open Space and Preservation	Lots	Acres	
Agricultural Preservation	50	1,813	
Howard County/Homeowner's Association	249	3,852	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	20	440	
Total Preservation	324	6,235	
Open Space (Dedicated to County)	11	62	
Open Space (Not Dedicated to County)	64	301	
Total Open Space	75	363	
TOTAL	399	6,598	71.2%
GRAND TOTAL (Includes Res. Develop.)	2,530	9,271	100.0%

acres. This includes all 18,947 acres of agricultural preservation easements and 4,422 acres of other preservation parcels dedicated through the subdivision process. This represents about 25 percent of the approximate 94,660 total acres of land in the Rural West.

Map 15 shows the preserved land in Howard County as of September 30, 2003 including acquired (purchased) agricultural easements and dedicated agricultural and other preserved parcels.

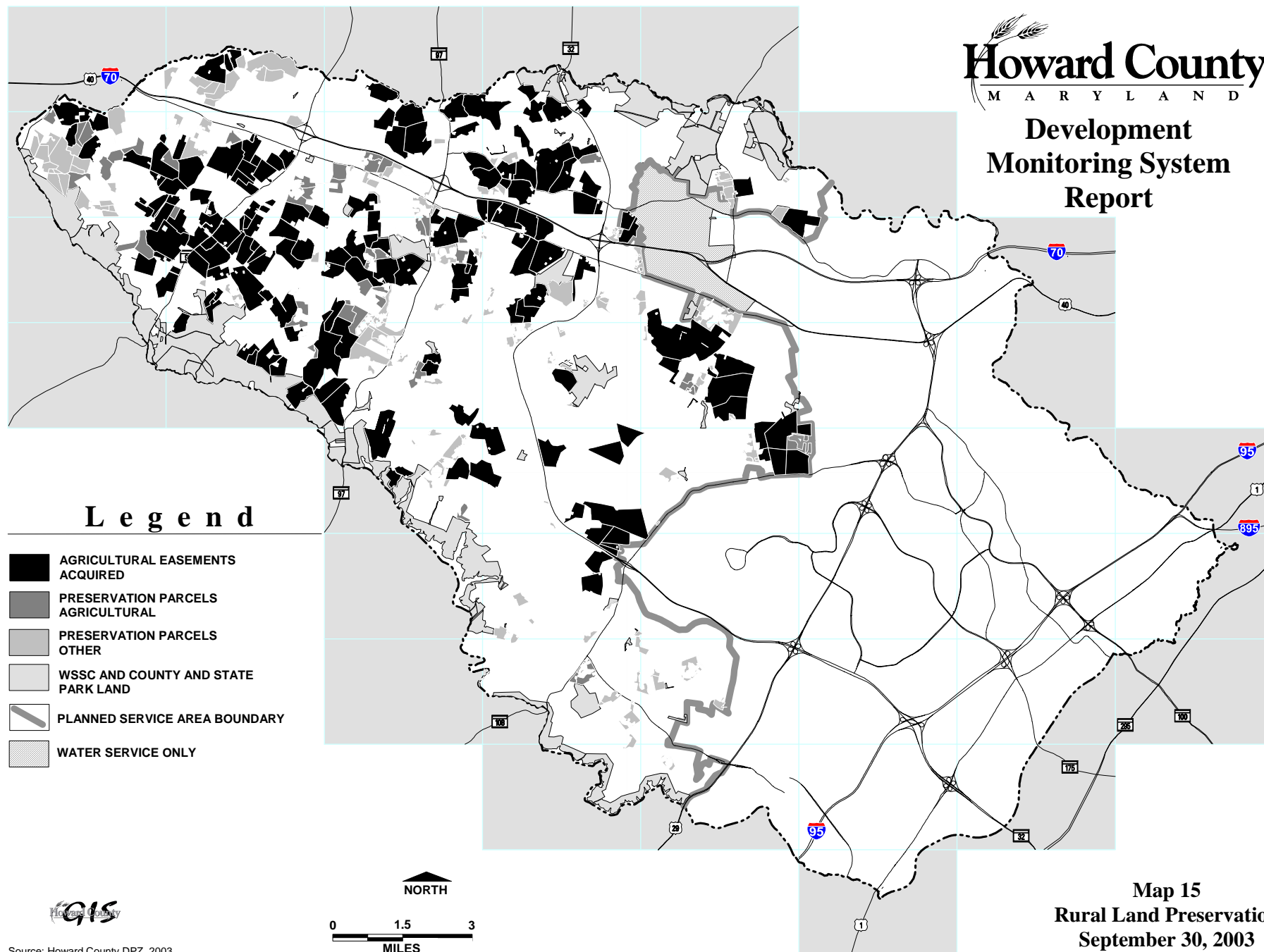
Total Preserved Land in the Rural West

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 34,102 acres, about 36 percent of all land in the Rural West.

Howard County

M A R Y L A N D

Development Monitoring System Report



Non-Residential Development

Recorded Non-Residential Subdivisions

For this report, non-residential development is tabulated within four regions as shown on Map 16. The number of non-residential *plans* recorded, the number of non-residential *lots* created, and the *acreage* of plans recorded have been compiled for each of these regions and are discussed below. The analysis includes last year's subdivision activity as well as activity for the previous four years.

Summary of Last Year's Results

Last year there were 86 non-residential lots recorded countywide in 38 subdivision plans totaling 1,042 acres (Table 40). The I-95 Corridor had the most lots with 49, or 57 percent of the total. Columbia had 27 percent of the total with 23 recorded lots. The West had 9 recorded lots last year, followed by Ellicott City with 5 recorded lots. Of the 38 subdivision plans recorded last year, 42 percent each were in the I-95 Corridor, followed by 24 percent each in Columbia and the West and 11 percent in Ellicott City.

Of the total 1,042 acres of non-residential land recorded, 395 acres, or 38 percent, were in the I-95 Corridor. A total of 279 acres were recorded in the West (27 percent). In Columbia and Ellicott City there were 236 and 132 recorded acres last year, respectively, representing 23 and 13 percent of the total for each. These include all acres including recordations for the purpose of adjusting lines, adding easements, etc.

Table 41 shows the number of recorded lots by development type. Of the 86 lots recorded last year, 48 were for commercial uses (which includes retail and office space), 7 for industrial uses, and 4 were for government/institutional uses. There were also 27 other lots recorded for open space and non-buildable parcels. Most of the new commercial lots were in the I-95 Corridor and Columbia. All 7 of the industrial lots were in the I-95 Corridor. There were 4 government/ institutional lots, 3 in Ellicott City and 1 in the West.

Table 40
Recorded Non-Residential Subdivisions, 10/01/02 to 9/30/03

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	23	27%	9	24%	236	23%
Ellicott City	5	6%	4	11%	132	13%
I-95 Corridor	49	57%	16	42%	395	38%
West	9	10%	9	24%	279	27%
TOTAL	86	100%	38	100%	1,042	100%

Last Year's Projects - Greater than 50 Acres

Of the total 1,042 non-residential acres recorded last year, 669 acres, about 64 percent of the total, were in subdivisions that were more than 50 acres in size. These larger subdivisions are shown in Table 42. The location of these plans are shown on Map 16.

The I-95 Corridor includes 3 of these larger subdivisions totaling 239 acres. Columbia includes 172 acres, followed by the West with 168 acres and Ellicott City with 90 acres.

Five Year Results

Table 43 shows the recorded non-residential subdivisions for the last five years from October 1, 1998 to September 30, 2003. Over this five year period there were 455 non-residential lots recorded countywide in 227 subdivision plans totaling 5,396 acres. This equates to a five year average of 1,079 recorded acres per year. Over the five year period, 39 percent of the acreage was in Columbia, 31 percent in the I-95 Corridor, 23 percent in Ellicott City, and 6 percent in the West.

Table 44 shows the total non-residential acreage recorded by year for each of the last five years. There was slightly less recorded acreage last year compared to the previous two years – 1,042 acres last year compared to 1,095 acres in 2001/2002. Chart 21 shows these results graphically by re-

Table 41
Recorded Lots by Development Type, 10/01/02 to 9/30/03

Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	17	0	0	6	23
Ellicott City	2	0	3	0	5
I-95 Corridor	23	7	0	19	49
West	6	0	1	2	9
TOTAL	48	7	4	27	86
PERCENT	56%	8%	5%	31%	100%

1. Includes open space and non-buildable parcel.

Table 42
Recorded Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 10/01/02 to 9/30/03

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-04-015	Snowden River Business Park	Commercial	102	172
	F-03-154	Town Center	Commercial	70	
Ellicott City	F-04-041	New Cut Landfill	Gov./Inst.	90	90
I-95 Corridor	F-02-111	Revitz Property	Commercial	95	239
	F-02-131	Emerson	Commercial	70	
	F-03-040	Exeter Industrial Park	Industrial	74	
West	F-03-007	Maple Lawn Farms	Commercial	52	168
	F-02-103	Covenant Baptist Church	Gov./Inst.	116	
TOTAL					669

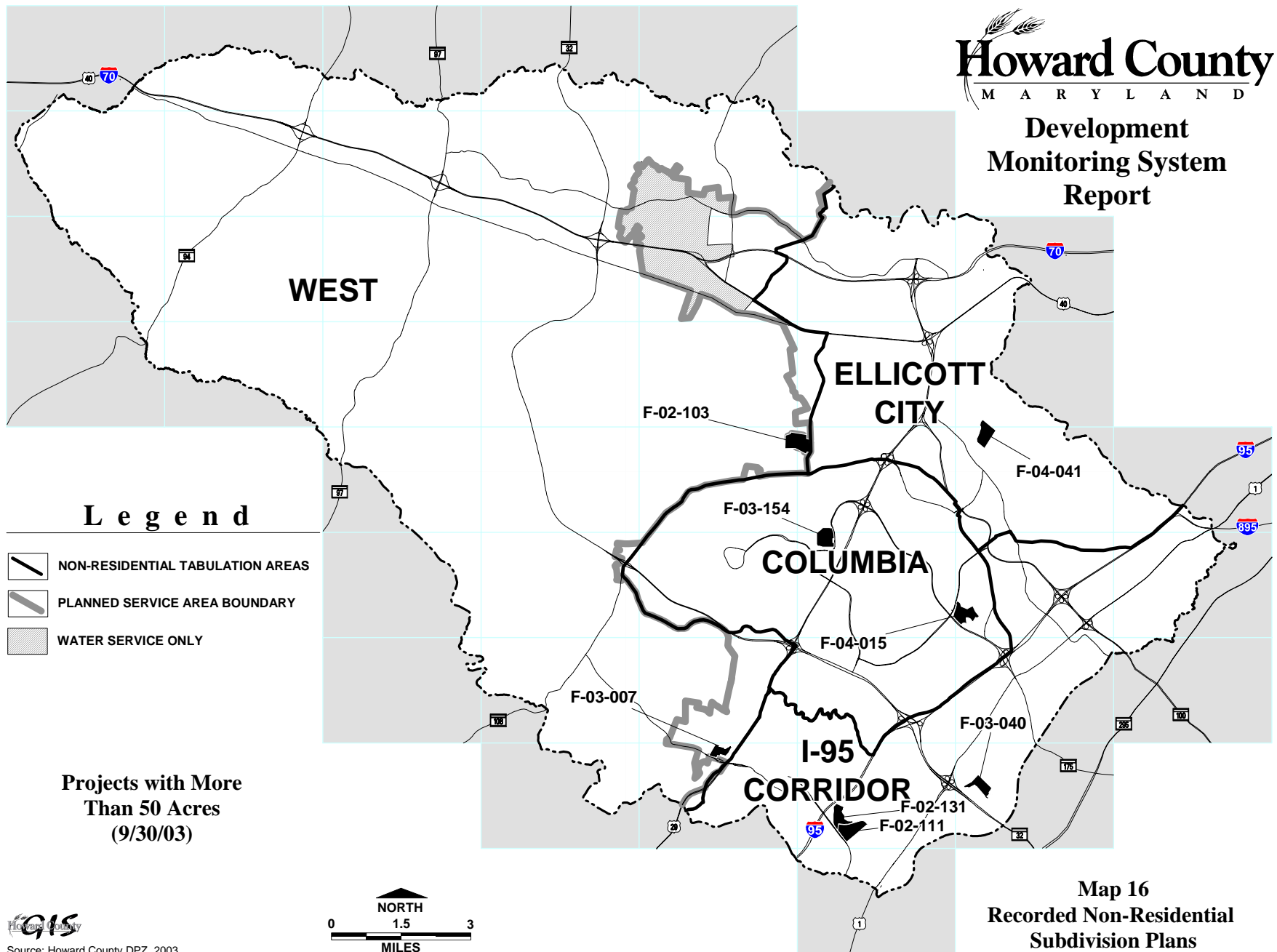


Table 43
Recorded Non-Residential Subdivisions, 10/01/98 to 9/30/03

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	190	42%	86	38%	2,128	39%
Ellicott City	42	9%	24	11%	325	6%
I-95 Corridor	147	32%	69	30%	1,699	31%
West	76	17%	48	21%	1,244	23%
TOTAL	455	100%	227	100%	5,396	100%
5 YEAR AVG.	91		45		1,079	

gion. It is apparent that Columbia has had the most activity over the five year period with more than 39 percent of the total countywide acreage recorded there. It should be again be noted that the recorded acreage includes resubdivisions and subdivisions to add easements and does not therefore reflect net new recorded non-residential acreage.

Table 45 summarizes the number of lots by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, commercial and industrial lots comprised about 34 percent each of the total 455 recorded lots. This is followed by other lots at 27 percent of the total. (Other lots include uses such as roadways, non-buildable parcels and roadways.) Government and institutional lots consisted of the remaining 5 percent of the five year total.

Chart 21
Recorded Non-Residential Acres

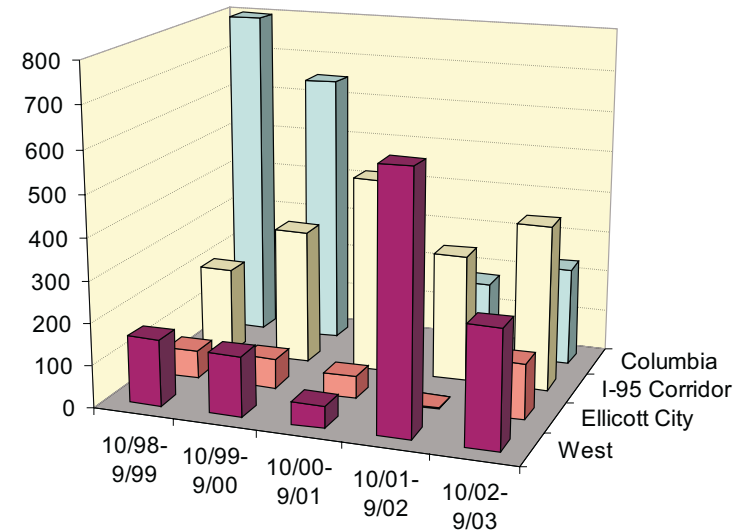


Table 44
Recorded Non-Residential Acreage, 10/01/98 to 9/30/03

Region	10/98-9/99	10/99-9/00	10/00-9/01	10/01-9/02	10/02-9/03	TOTAL	PERCENT
Columbia	799	653	261	179	236	2,128	39%
Ellicott City	67	71	53	2	132	325	6%
I-95 Corridor	209	323	468	304	395	1,699	31%
West	159	143	53	610	279	1,244	23%
TOTAL	1,234	1,190	835	1,095	1,042	5,396	100%

Table 45
Number of Non-Residential Recorded Lots by Development Type, 10/01/98 to 9/30/03

10/98 to 9/99					
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	9	17	2	23	51
Ellicott City	10	2	0	5	17
I-95 Corridor	2	11	0	3	16
West	13	8	0	8	29
TOTAL	34	38	2	39	113
PERCENT	30%	34%	2%	35%	100%

10/00 to 9/01					
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	12	13	3	8	36
Ellicott City	0	0	3	1	4
I-95 Corridor	1	32	1	6	40
West	3	5	1	0	9
TOTAL	16	50	8	15	89
PERCENT	18%	56%	9%	17%	100%

10/02 to 9/03					
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	17	0	0	6	23
Ellicott City	2	0	3	0	5
I-95 Corridor	23	7	0	19	49
West	6	0	1	2	9
TOTAL	48	7	4	27	86
PERCENT	56%	8%	5%	31%	100%

10/99 to 9/00					
Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	
17	21	1	20	59	
15	0	1	0	16	
2	22	1	4	29	
5	7	1	8	21	
39	50	4	32	125	
31%	40%	3%	26%	100%	

10/01 to 9/02					
Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	
11	3	2	5	21	
0	0	0	0	0	
4	2	1	6	13	
3	4	0	1	8	
18	9	3	12	42	
43%	21%	7%	29%	100%	

TOTAL 10/98 to 9/03					
Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	
66	54	8	62	190	
27	2	7	6	42	
32	74	3	38	147	
30	24	3	19	76	
155	154	21	125	455	
34%	34%	5%	27%	100%	

1. Includes uses such as roadway, non-buildable parcels & open space.

In-Process Non-Residential Subdivisions

This section summarizes non-residential subdivisions in process. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential lots and acreage currently being processed as of September 30, 2003 are tabulated and compared with those in process a year earlier (as of September 30, 2002).

Number of Plans

Countywide, there were 18 non-residential plans in process as of September 30, 2003, which is less than last year when there were 31 plans in process (Table 46). Eight plans were in the I-95 Corridor, 6 plans in the

West, 3 in Columbia and only one in Ellicott City.

For both years most of the plans were in the Final Plan stage. This is primarily due to the relatively high number of resubdivisions which only come in at the Final Plan stage.

Number of Lots

Table 47 shows the number of potential non-residential lots in process. As of September 30, 2003, there were 36 lots in process, less than the 79 in process on September 30, 2002.

Table 46
Number of Non-Residential Plans in Process, 09/30/02 and 09/30/03

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
Columbia	0	1	0	0	0	0	3	2	3	3
Ellicott City	0	0	0	0	0	0	2	1	2	1
I-95 Corridor	2	1	1	0	0	0	13	7	16	8
West	1	1	0	1	0	0	9	4	10	6
TOTAL	3	3	1	1	0	0	27	14	31	18

Table 47
Number of Potential Non-Residential Lots from Subdivision Plans in Process, 09/30/02 and 09/30/03

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL LOTS	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
Columbia	0	5	0	0	0	0	8	5	8	10
Ellicott City	0	0	0	0	0	0	2	0	2	0
I-95 Corridor	6	1	2	0	0	0	46	12	54	13
West	1	1	0	1	0	0	14	11	15	13
TOTAL	7	7	2	1	0	0	70	28	79	36

The I-95 Corridor and the West each had 13 lots in process in 2003. Columbia had 10 lots in process. Table 50 shows a more detailed breakdown of the number of non-residential lots in process by development type for this most recent year and for one year earlier.

Number of Acres

There were a total of 484 non-residential acres in the subdivision process as of September 30, 2003 (Table 48). This compares to 820 acres in process one year earlier. For the current year most of the acreage is in Columbia (188 acres). This is followed by the I-95 Corridor with 164 acres, the West with 126 acres and Ellicott City with 6 acres.

these are 116 acres in Columbia as part of the Benson East development. There are also 68 acres in Town Center which is a resubdivision plat. In the I-95 Corridor, the Blue Stream Corporate Center has 76 acres in the subdivision process and Emerson has 59 commercial acres in process. In the West, there are 63 acres in process in Turf Valley. Map 17 shows the locations of these projects.

Major Projects

Of the 484 acres of non-residential land in process, 382 acres (close to 80 percent) are for projects greater than 50 acres (Table 49). The largest of

Table 48
Acreage of Non-Residential Subdivision Plans in Process, 09/30/02 and 09/30/03

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
Columbia	0	116	0	0	0	0	19	72	19	188
Ellicott City	0	0	0	0	0	0	32	6	32	6
I-95 Corridor	147	59	7	0	0	0	307	105	461	164
West	25	25	0	0	0	26	283	75	308	126
TOTAL	172	200	7	0	0	26	641	258	820	484

Table 49
In-Process Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 09/30/03

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	S-03-005	Benson East	Commercial	116	184
	F-04-045	Town Center	Commercial	68	
I-95 Corridor	F-02-035	Blue Stream Corporate Center	Industrial	76	135
	S-99-012	Emerson	Commercial	59	
West	F-02-074	Turf Valley Professional Buildings	Commercial	63	63
TOTAL					382

Table 50
Number of Potential Lots From Non-Residential Subdivision Plans in Process by Development Type, 09/30/02 and 09/30/03

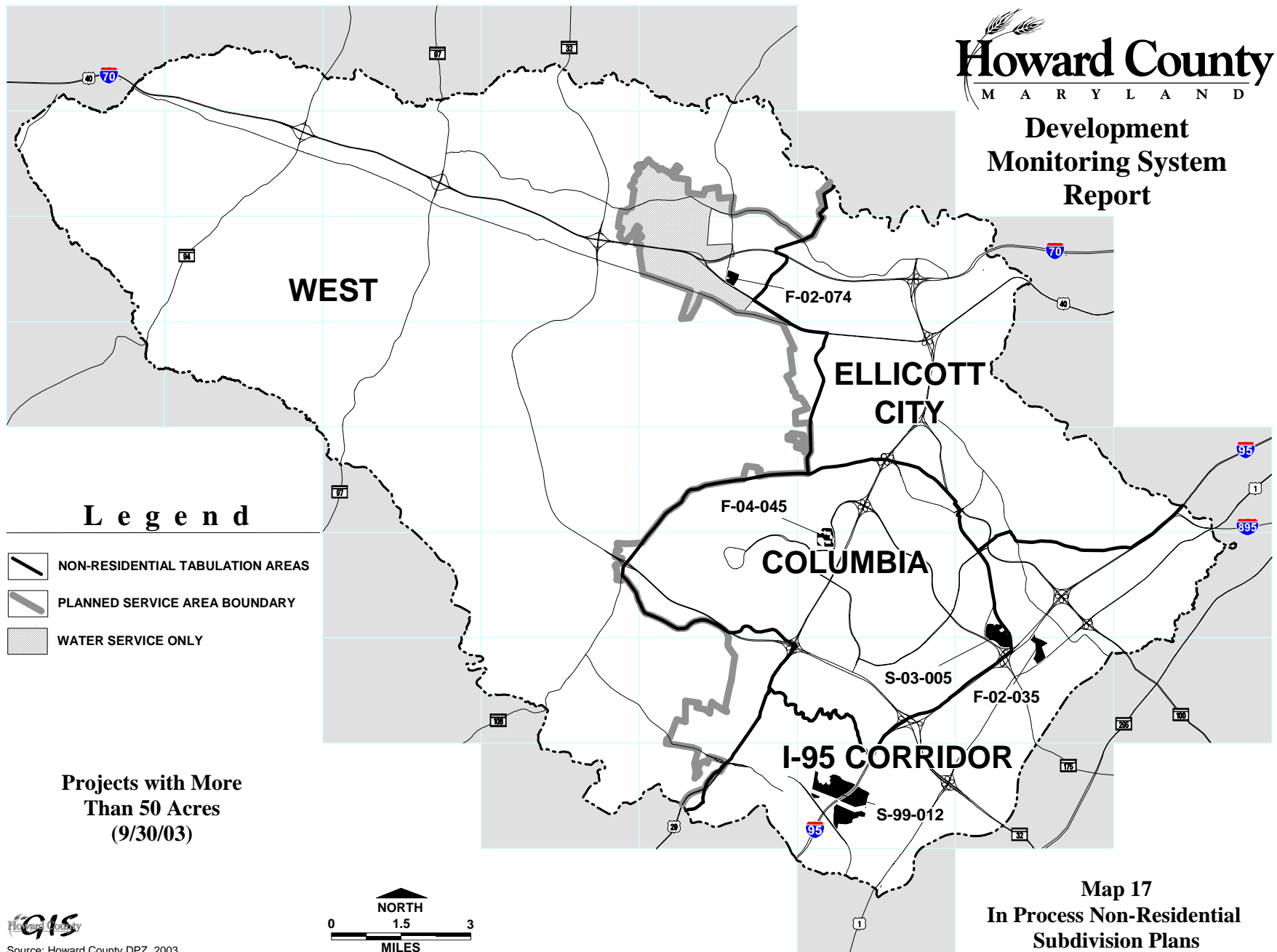
09/30/03 ==> Sketch						Preliminary Equivalent Sketch				
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	5	0	0	0	5	0	0	0	0	0
Ellicott City	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	1	0	0	0	1	0	0	0	0	0
West	1	0	0	0	1	0	0	1	0	1
TOTAL	7	0	0	0	7	0	0	1	0	1

09/30/03 ==> Preliminary						Final					TOTAL - 09/30/03				
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	0	0	0	0	0	5	0	0	0	5	10	0	0	0	10
Ellicott City	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	0	0	0	0	0	0	10	0	2	12	1	10	0	2	13
West	0	0	0	0	0	2	4	3	2	11	3	4	4	2	13
TOTAL	0	0	0	0	0	7	14	3	4	28	14	14	4	4	36

09/30/02 ==> Sketch						Preliminary Equivalent Sketch				
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0
Ellicott City	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	1	5	0	0	6	0	2	0	0	2
West	1	0	0	0	1	0	0	0	0	0
TOTAL	2	5	0	0	7	0	2	0	0	2

09/30/02 ==> Preliminary						Final					TOTAL - 09/30/02				
Region	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL	Com.	Ind.	Gov./Inst.	Other ¹	TOTAL
Columbia	0	0	0	0	0	8	0	0	0	8	8	0	0	0	8
Ellicott City	0	0	0	0	0	0	0	2	0	2	0	0	2	0	2
I-95 Corridor	0	0	0	0	0	16	11	0	19	46	17	18	0	19	54
West	0	0	0	0	0	9	0	0	5	14	10	0	0	5	15
TOTAL	0	0	0	0	0	33	11	2	24	70	35	18	2	24	79

1. Includes access easements, open space, stormwater management, and roadway.



Approved Non-Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by four regions. The number of non-residential site development *plans* approved, the number of *lots* approved, and the *acreage* of approved plans have been compiled for each of these regions and are discussed below.

Additionally, the square footage of floor space in approved site development plans is compiled. This is useful to estimate employment, which is discussed later in this report (Page 78). The analysis includes last year's site development plan activity as well as activity for the last five years.

Summary of Last Year's Results

Last year there were 64 non-residential lots approved countywide in 61 site development plans totaling about 1,421 acres (Table 51). Columbia had 16 lots approved, Ellicott City and the I-95 Corridor had 15 lots each, and the West had 18 approved lots last year. Of the 61 site development plans approved last year, 16 were in Columbia, 13 were in Ellicott City, 15 were in the I-95 Corridor and 17 were in the West..

Of the total 1,421 acres of non-residential land approved in site development plans, 989 acres, or 70 percent, were in the West. A total of 162 acres were approved in Columbia (11 percent). In Ellicott City there were 144

Table 51 Approved Non-Residential Site Development Plans, 10/01/02 to 9/30/03						
Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	16	25%	16	26%	162	11%
Ellicott City	15	23%	13	21%	144	10%
I-95 Corridor	15	23%	15	25%	126	9%
West	18	28%	17	28%	989	70%
TOTAL	64	100%	61	100%	1,421	100%

approved acres last year representing 10 percent of the total. There were 126 acres approved in the I-95 Corridor, 9 percent of the total.

Table 52 shows the number of approved lots by development type. Of the 64 lots recorded last year, 21 are for government and institutional uses, 10 each are for retail and office/service uses and 7 are for manufacturing/extensive industrial uses. There were also 16 other lots approved for athletic fields, mass grading, paved surfaces and other uses.

Table 52 Number of Lots in Approved Site Development Plans, 10/01/02 to 9/30/03						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	5	4	0	3	4	16
Ellicott City	1	1	0	7	6	15
I-95 Corridor	2	4	6	1	2	15
West	2	1	1	10	4	18
TOTAL	10	10	7	21	16	64
1. Includes athletic fields, mass grading, pathways, road improvements, substation, pump station, community rooms, parking lots, and storm water management pond.						

Table 53 shows the square footage of building space in last year's approved site development plans by type of use. Countywide, there was slightly more than 1.8 million square feet of building space approved. About 48 percent of this total, 870,000 square feet, was in the I-95 Corridor. About 428,000 square feet was in Columbia (24 percent). The West had about 384,000 square feet approved (21 percent), followed by Ellicott City with about 135,000 square feet (7 percent).

Slightly more than 39 percent of the total building space is for manufacturing/extensive industrial uses totaling 714,000 square feet. This is followed by government & institutional uses with almost 540,000 square feet of approved building space (30 percent). About 338,000 square feet are for

office/service uses (19 percent), and about 219,000 square feet are for retail use (3 percent).

Table 53 Building Square Feet in Approved Site Development Plans, 10/01/01 to 9/30/02						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	141,486	187,575	0	99,386	0	428,447
Ellicott City	2,400	10,093	0	115,747	6,889	135,129
I-95 Corridor	32,940	128,185	698,631	9,940	0	869,696
West	41,807	11,952	15,410	314,687	0	383,856
TOTAL	218,633	337,805	714,041	539,760	6,889	1,817,128
PERCENT	12.0%	18.6%	39.3%	29.7%	0.4%	100.0%

Last Year's Projects - Greater than 50,000 Square Feet

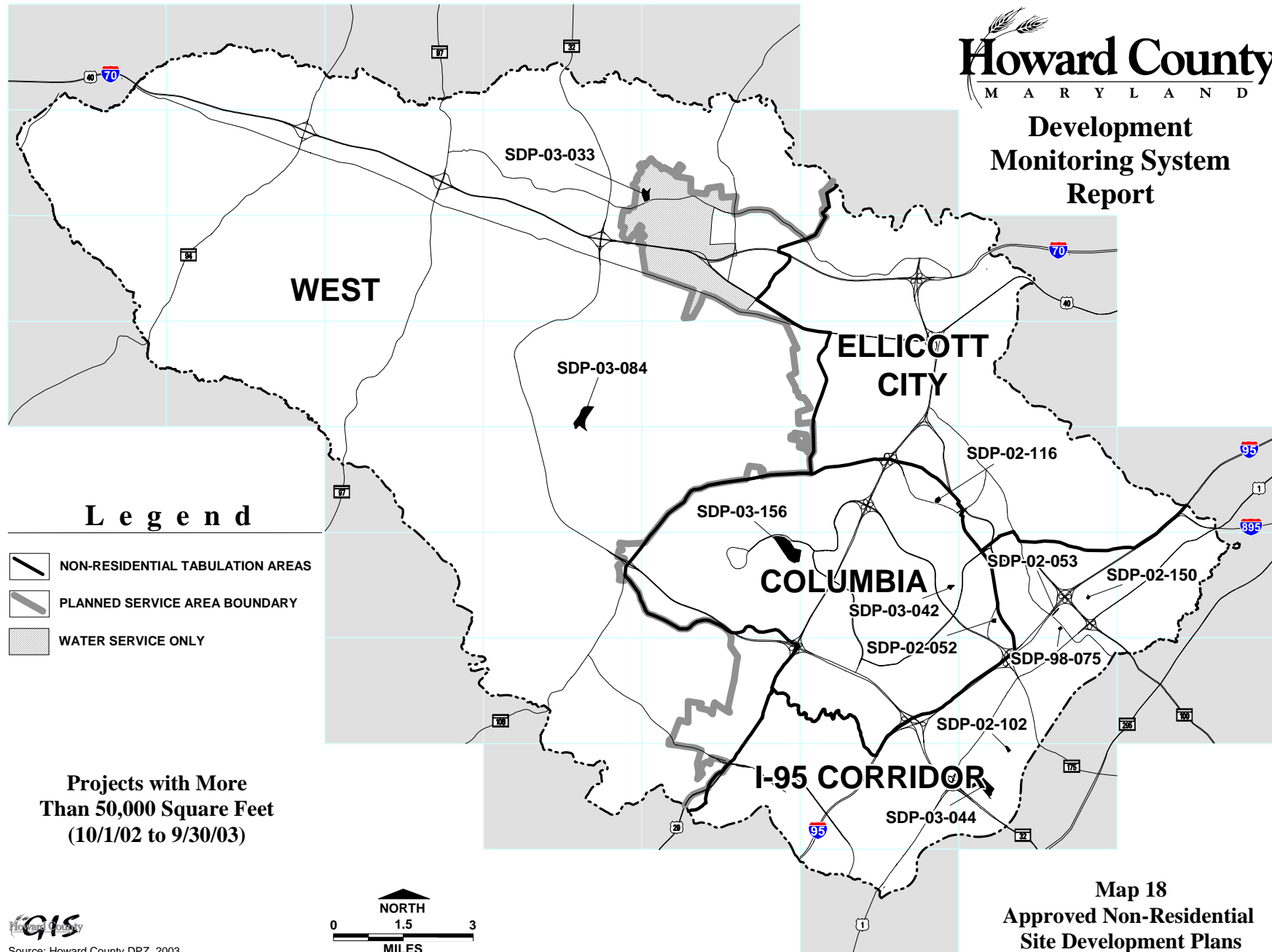
Of the 1.8 million square feet of non-residential building space approved in site development plans last year, a little over 1.2 million square feet, about 68 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 54. The location of these plans are shown on Map 18.

In Columbia, four plans with more 50,000 square feet of building space were approved last year. These plans, located in various parts of Columbia as described in Table 54, total over 300,000 square feet. Along the I-95 Corridor, five larger plans were approved totaling more than 700,000 square feet, including the largest plan approved last year, a new 372,000 Giant Food distribution center in the Exeter Industrial Park. In the West there were two larger plans approved totaling about 208,000 square feet. Both of these are for schools, the new northern highs school and an addition at the Glenelg County School.

Table 54 Projects With More Than 50,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/02 to 9/30/03					
Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-03-156	Howard Community College	School	82,000	301,435
	SDP-02-052	Gateway Office Park	Office	98,000	
	SDP-02-116	Oakland Executive Park	Supermarket	56,123	
	SDP-03-042	Route 175 Commercial	Retail Site	65,312	
I-95 Corridor	SDP-03-044	Exeter Industrial Park	Distribution Center	372,511	722,791
	SDP-02-053	Kane Companies, Inc. Headquarters	Warehouse, Office	81,795	
	SDP-02-102	Dorsey Woods	Warehouse, Office	120,000	
	SDP-02-150	Troy Hill Corporate Center	Warehouse, Office	65,685	
	SDP-98-075	Meadowridge Business Park	Warehouse, Office	82,800	
West	SDP-03-033	New Northern High School	School	136,752	208,243
	SDP-03-084	Glenelg Country School	School Addition	71,491	
TOTAL					1,232,469



Development Monitoring System Report



Source: Howard County DPZ, 2003.

Five Year Results

Table 55 shows the approved non-residential site development plans for the last five years from October 1, 1998 to September 30, 2003. Over this five year period there were 386 non-residential lots approved countywide in 335 plans totaling 5,198 acres. This equates to a five year average of 1,040 approved acres per year. Over the five year period, 41 percent of the acreage was in the West, 26 percent in the I-95 Corridor, 24 percent in Columbia and 8 percent in Ellicott City.

Table 55
Approved Non-Residential Site Development Plans, 10/01/98 to 9/30/03

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	146	38%	113	34%	1,267	24%
Ellicott City	67	17%	61	18%	441	8%
I-95 Corridor	110	28%	100	30%	1,371	26%
West	63	16%	61	18%	2,120	41%
TOTAL	386	100%	335	100%	5,198	100%
5 YEAR AVG.	77		67		1,040	

Table 56 shows the total non-residential acreage approved by year for each of the last five years. Last year, 127 more acres were approved compared to the previous two years – 1,421 acres last year compared to 1,294 acres for the year before.

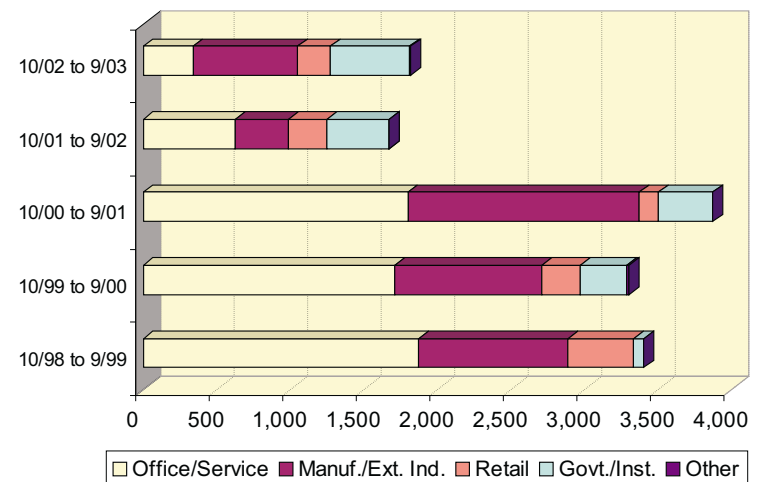
Table 56
Acreage in Approved Non-Residential Site Development Plans, 10/01/98 to 9/30/03

Region	10/98-9/99	10/99-9/00	10/00-9/01	10/01-9/02	10/02-9/03	TOTAL	PERCENT
Columbia	160	300	320	325	162	1,267	24%
Ellicott City	68	99	73	58	144	441	8%
I-95 Corridor	259	239	453	294	126	1,371	26%
West	286	121	107	617	989	2,120	41%
TOTAL	772	758	953	1,294	1,421	5,198	100%

Table 57 summarizes the approved square footage by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, about 14 million square feet of non-residential space has been approved in the County. This is an average of about 2.8 million square feet per year.

Of this total, about 45 percent or 6.35 million square feet are for office/service space. A little over 33 percent or 4.7 million square feet are for

Chart 22
Approved Non-Residential Square Feet (X 1,000)



manufacturing/extensive industrial development (which includes warehouse space). Government and institutional uses account for about 12 percent of the approved building space (about 1.7 million square feet). Retail space accounts for about 9 percent of the total with about 1.3 million square feet approved. The remaining 0.2 percent (23,600 square feet) are for other uses.

Chart 22 graphically shows the countywide square footage approved by development type for each of the five years. It is clear that there has been a large reduction in approved space the last two years compared to the three years prior. The amount of approved space the last two years was only about 40 to 55 percent of what it was for each of the previous three years. This reduction primarily occurred in the amount of office/service and manufacturing & extensive industrial space approved. There was actually

more government & institutional space approved each of the last two years compared to the previous four years, primarily due to several new schools as well as a number of public and private school expansions.

Chart 23 shows the five year approved square footage total by development type by region. It is clear that the I-95 Corridor has had the most manufacturing/extensive industrial square footage approved. Columbia has had the most office/service and retail square footage approved over the five year period.

Chart 24 shows the total non-residential square footage approved over time for each region. Overall, Columbia and the I-95 Corridor have had the most square footage approved, followed by the West and Ellicott City. Table 57 reflects these results numerically.

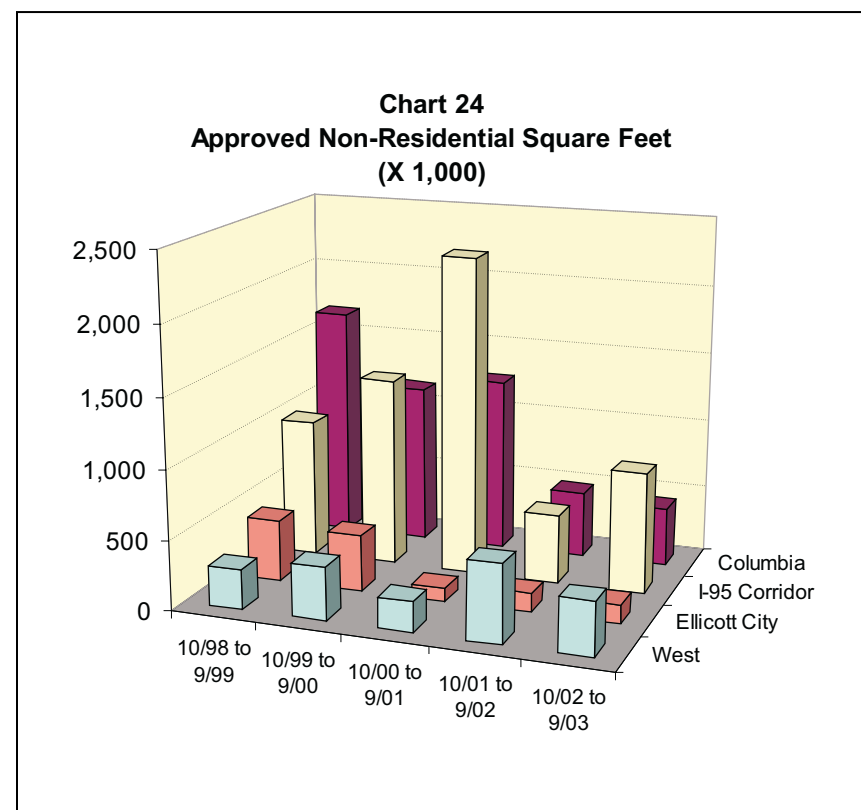
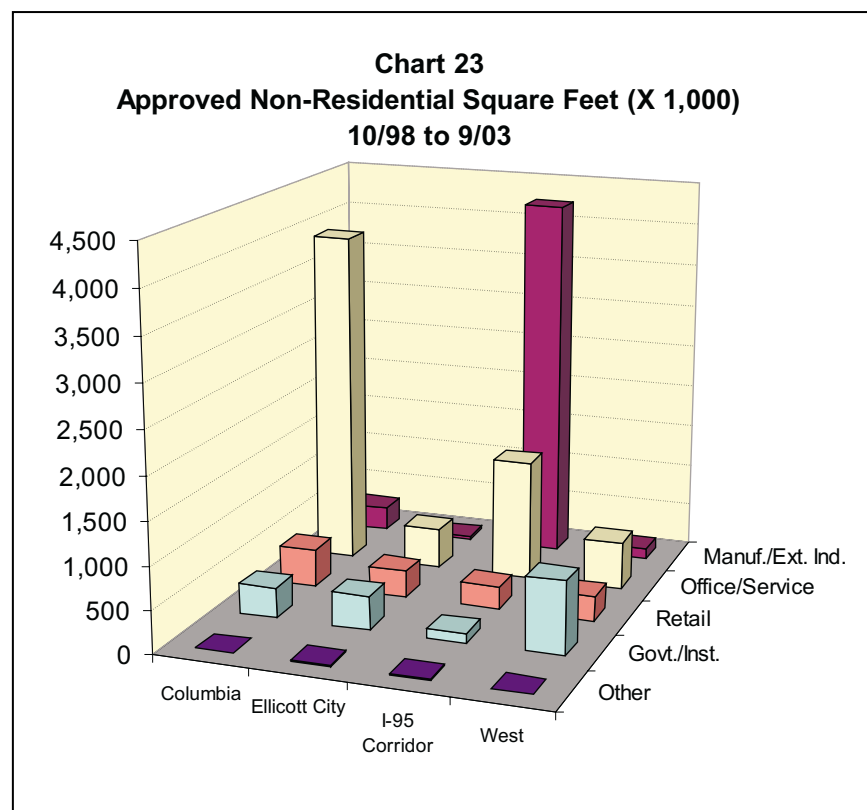


Table 57
Building Square Feet in Approved Non-Residential Site Development Plans, 10/01/98 to 9/30/03

10/98-9/99							10/99-9/00					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	4,000	1,593,835	58,125	20,157	0	1,676,117	117,171	931,874	56,145	42,465	0	1,147,655
Ellicott City	242,826	169,625	24,250	0	4,663	441,364	26,287	259,259	0	121,705	139	407,390
I-95 Corridor	12,000	54,309	934,540	0	0	1,000,849	115,166	412,006	829,402	0	6,951	1,363,525
West	187,026	56,411	0	45,488	0	288,925	1,722	107,216	113,932	155,502	4,800	383,172
TOTAL	445,852	1,874,180	1,016,915	65,645	4,663	3,407,255	260,346	1,710,355	999,479	319,672	11,890	3,301,742
PERCENT	13.1%	55.0%	29.8%	1.9%	0.1%	100.0%	7.9%	51.8%	30.3%	9.7%	0.4%	100.0%
10/00-9/01							10/01-9/02					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	63,728	916,932	153,206	127,111	0	1,260,977	116,334	290,815	6,600	63,368	0	477,117
Ellicott City	14,555	20,401	0	59,030	139	94,125	29,524	6,687	0	102,746	0	138,957
I-95 Corridor	49,160	796,563	1,421,193	28,352	0	2,295,268	55,000	13,549	354,577	75,497	0	498,623
West	2,237	65,930	0	152,185	0	220,352	58,410	317,028	0	183,297	0	558,735
TOTAL	129,680	1,799,826	1,574,399	366,678	139	3,870,722	259,268	628,079	361,177	424,908	0	1,673,432
PERCENT	3.4%	46.5%	40.7%	9.5%	0.0%	100.0%	15.5%	37.5%	21.6%	25.4%	0.0%	100.0%
10/02-9/03							TOTAL 10/98-9/03					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	141,486	187,575	0	99,386	0	428,447	442,719	3,921,031	274,076	352,487	0	4,990,313
Ellicott City	2,400	10,093	0	115,747	6,889	135,129	315,592	466,065	24,250	399,228	11,830	1,216,965
I-95 Corridor	32,940	128,185	698,631	9,940	0	869,696	264,266	1,404,612	4,238,343	113,789	6,951	6,027,961
West	41,807	11,952	15,410	314,687	0	383,856	291,202	558,537	129,342	851,159	4,800	1,835,040
TOTAL	218,633	337,805	714,041	539,760	6,889	1,817,128	1,313,779	6,350,245	4,666,011	1,716,663	23,581	14,070,279
PERCENT	12.0%	18.6%	39.3%	29.7%	0.4%	100.0%	9.3%	45.1%	33.2%	12.2%	0.2%	100.0%

1. Includes plans for such things as athletic fields, mass grading, pathways, road improvements, substations, pump stations, community rooms, parking lots, and storm water management ponds.

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of September 30, 2003 are tabulated and compared with those in process a year earlier (as of September 30, 2002).

Number of Plans

Countywide, there were 65 non-residential site development plans in process as of September 30, 2003, only 3 less than the 68 in process one year earlier (Table 58). As of September 30, 2003, the I-95 Corridor had the most plans in process with 24. This is followed by 19 plans in process in the West and 11 plans each in process in Ellicott City and Columbia.

Table 58
Number of Non-Residential SDP's In Process, 09/30/02 & 09/30/03

Region	2002	2003
Columbia	15	11
Ellicott City	18	11
I-95 Corridor	19	24
West	16	19
TOTAL	68	65

Number of Lots

Table 59 shows the number of potential non-residential lots in the site development plan process. Results are shown for each year and by development type. Similar to the number of plans, there were less lots in process on September 30, 2003 compared to one year earlier, 67 versus 71, respectively.

The greatest number of the non-residential lots in process for 2003 were in the I-95 Corridor with 24. The West had the next greatest activity with 20 lots. This is followed by 12 lots in process in Columbia and 11 lots in process in Ellicott City.

As of September 30, 2003, there were 19 office/service lots in the site development plan process. There were also 9 retail lots, 9 government and institutional lots, 8 manufacturing/extensive industrial lots and 22 other lots in process.

Number of Acres

There were a total of 1,364 acres of non-residential land in the site development plan process as of September 30, 2003 (Table 60). This compares to about the same amount of 1,321 acres in process the previous year. For the current year most of the acreage is in the West (718 acres including 360

Table 59
Number of Lots in Site Development Plans In Process by Development Type, 09/30/02 & 09/30/03

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other ¹		TOTAL	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
Columbia	3	1	4	3	0	0	2	2	6	6	15	12
Ellicott City	1	0	3	3	0	0	6	1	10	7	20	11
I-95 Corridor	2	4	8	8	7	7	1	1	1	4	19	24
West	4	4	1	5	1	1	8	5	3	5	17	20
TOTAL	10	9	16	19	8	8	17	9	20	22	71	67

1. Includes plans for such things as mass grading, paved surfaces, athletic fields, stormwater management ponds, community bldgs/pool, storage buildings.

Table 60
Acreage of Non-Residential SDP's In Process, 09/30/02 & 09/30/03

Region	2002	2003
Columbia	181	83
Ellicott City	191	44
I-95 Corridor	464	519
West	485	718
TOTAL	1,321	1,364

acres noted on a plan for a storm water management facility at Johns Hopkins APL). The I-95 Corridor had the second greatest amount of acreage in process (519 acres including 328 acres for the Chase quarry.) This is followed by Columbia with 83 acres and Ellicott City with 44 acres.

Building Floor Space

Table 61 shows the square footage of non-residential building space by building type in the site development plan process. As of September 30, 2003 there was about 1.46 million square feet of building space in the site development plan process. This compares to 1.74 million square feet in process for the previous year.

For both years most of the building space was in the I-95 Corridor. This is followed by planned space in the West, Columbia and Ellicott City, respectively.

As of September 30, 2003, there was about 510,000 square feet of manufacturing/extensive industrial building space in the site development plan process. This is followed by about 458,000 square feet of office/service space, 239,000 square feet of government and institutional space, 161,000 square feet of retail space and 95,000 square feet of other space in process. Chart 25 reflects these results graphically and by region.

Major Projects

Of the total 1.46 million square feet of non-residential building space in the site development plans process as of September 30, 2003, about 867,000 square feet, 59 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 61. The location of these plans are shown on Map 19.

In Columbia, one plan totaling close to 114,000 square feet of building space was in process. This is for an addition to Howard High School. In Ellicott City, an office and restaurant project in the Columbia 100 Office Research Park totals about 53,000 square feet. In the I-95 Corridor, there were four larger plans in process, totaling about 553,000 square feet. These plans include development in the Route 100 Industrial Park, a Day's Inn hotel, the Fairfax Recycling Center, and the Property of Leroy Merritt. The West has two plans over 50,000 square feet, both office and retail projects as part of Maple Lawn Farms and Waverly Woods.

Table 61
Building Square Feet in In-Process Non-Residential Site Development Plans, 09/30/02 & 09/30/03

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other		TOTAL	
	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003	2002	2003
Columbia	137,097	4,885	151,269	11,970	0	0	16,136	117,752	0	11,300	304,502	145,907
Ellicott City	2,880	15,300	43,315	87,600	0	0	115,747	18,754	6,868	13,600	168,810	135,254
I-95 Corridor	3,260	37,752	224,356	237,258	659,038	507,611	9,940	28,800	15,000	54,000	911,594	865,421
West	77,798	103,605	57,832	121,648	3,000	3,000	207,494	73,972	9,670	16,762	355,794	318,987
TOTAL	221,035	161,542	476,772	458,476	662,038	510,611	349,317	239,278	31,538	95,662	1,740,700	1,465,569

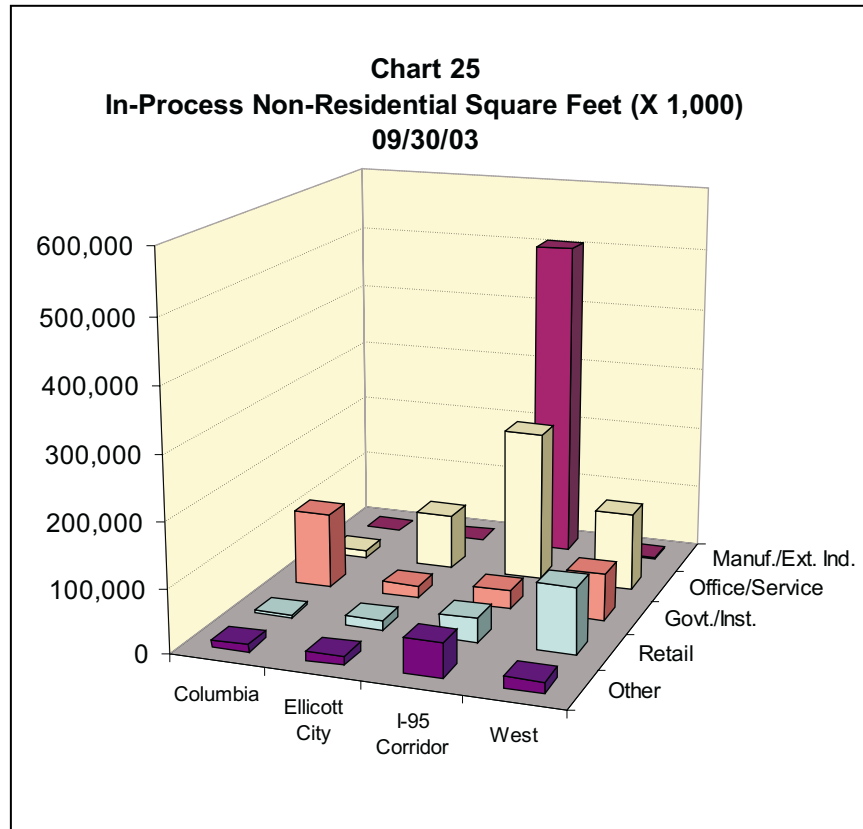
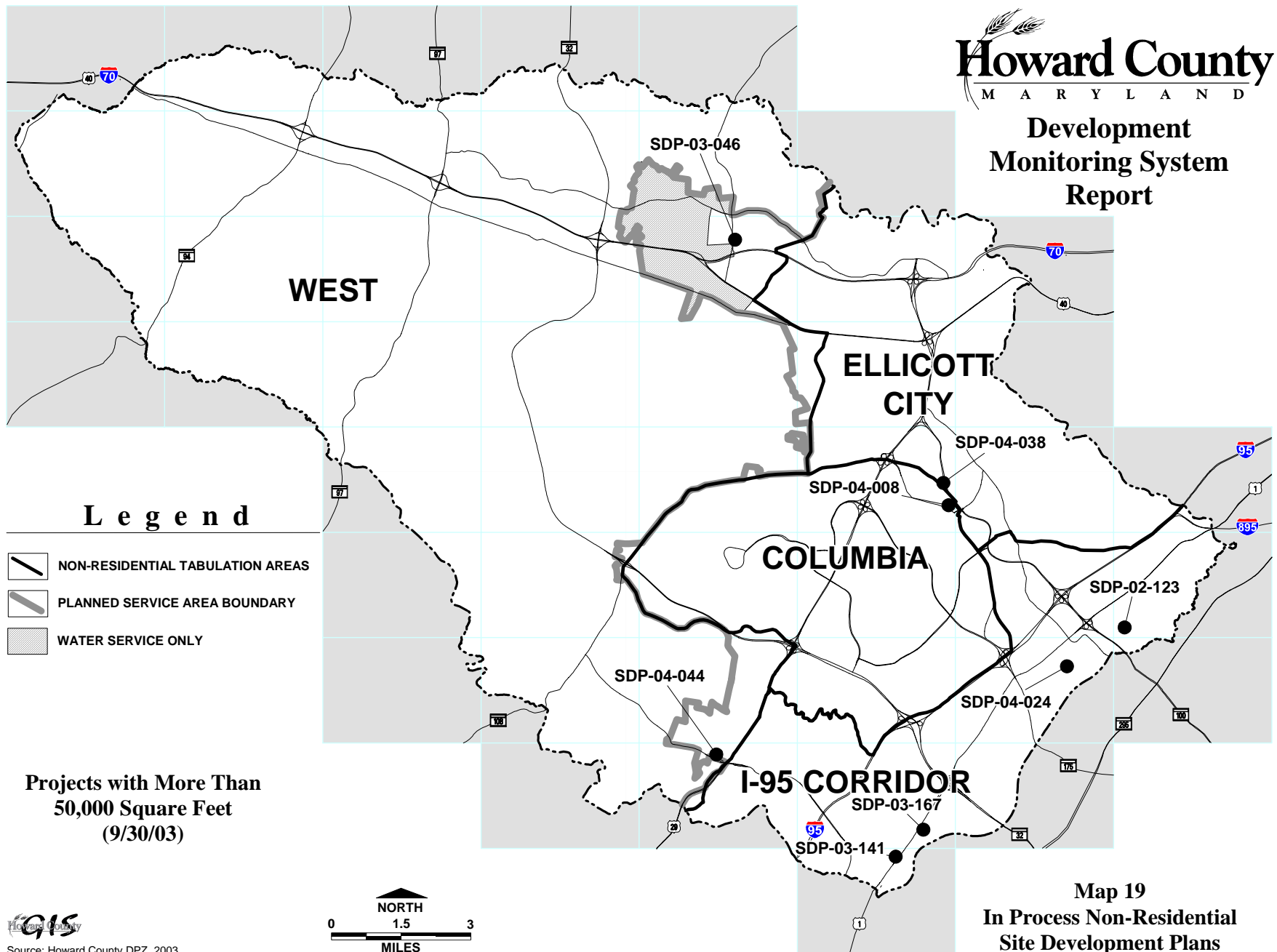


Table 62
Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 9/30/03

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-04-008	Howard High School Addition	Government - School Addition	113,648	113,648
Ellicott City	SDP-04-038	Columbia 100 Office Research Park	Office & Restaurant	53,118	53,118
I-95 Corridor	SDP-04-024	Fairfax Recycling, Inc.	Warehouse & Office	55,115	553,307
	SDP-02-123	Route 100 Industrial Park	Warehouse	54,412	
	SDP-03-167	Property of Leroy Merritt	Warehouse & Office	387,200	
	SDP-03-141	Days Inn Hotel	Hotel	56,580	
West	SDP-03-046	GTW's Waverly Woods	Office & Retail	69,240	147,380
	SDP-04-044	Maple Lawn Farms	Office & Retail	78,140	
TOTAL					867,453



Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by region.

Summary of Last Year's Results

Last year from October 1, 2002 to September 30, 2003, 111 non-residential building permits were issued for new construction (Table 63). The West and the I-95 Corridor had the greatest number of issued permits with 33

each, 60 percent of the total combined. Columbia had 23 issued permits (21 percent), and Ellicott City had 20 issued permits (20 permits).

Countywide, building permits were issued for close to 1.6 million square feet of non-residential space last year. Forty-six percent of this total, about 715,000 square feet, was for manufacturing/extensive industrial space. Another 404,933 square feet were for office/service space (26 percent). There were also permits issued for 256,740 square feet of retail space and 158,804 square feet of government and institutional space (Table 64).

By region, 944,996 square feet, 61 percent of the total, are in the I-95 Corridor. About 357,000 square feet are in Columbia and almost 141,000 square feet are in the West. The remaining 118,000 square feet are located in Ellicott City.

Last Year's Permits - Greater Than 50,000 Square Feet

Table 65 shows the major projects of more than 50,000 square feet that were issued building permits last year. These projects amount to slightly more than 840,000 square feet of space, about 54 percent of the 1.56 million square feet total. About 643,000 square feet of this space are in the

Table 63
Issued Non-Residential Building Permits, 10/01/01 to 9/30/03

Region	Number	Percent
Columbia	23	21%
Ellicott City	22	20%
I-95 Corridor	33	30%
West	33	30%
TOTAL	111	100%

Table 64
Square Feet of Issued Non-Residential Building Permits by Type, 10/01/01 to 9/30/02

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	PERCENT
Columbia	218,368	124,803	0	14,142	160	357,473	23%
Ellicott City	35,386	10,303	0	71,195	1,105	117,989	8%
I-95 Corridor	2,986	213,322	714,670	9,940	4,078	944,996	61%
West	0	55,505	0	63,527	21,695	140,727	9%
TOTAL	256,740	403,933	714,670	158,804	27,038	1,561,185	100%
PERCENT	16%	26%	46%	10%	2%	100%	

1. Includes community centers, pavillions, pump houses, guard shack, storage sheds, utility bldgs, storage space and other such building types.

Table 65
Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/02 to 9/30/03

Region	Subdivision/Name	Proposed Use	Square Feet	TOTAL
I-95 Corridor	Exeter Industrial Park	Giant Foods Distribution Warehouse	342,480	643,043
	Dorsey Woods	Warehouse	120,000	
	Dorsey Business Center	Office Building	63,319	
	Kane Companies Headquarters	Office/Warehouse Building	62,245	
	Comfort Suites	83 Room Hotel with Pool	54,999	
Columbia	The Mall in Columbia	Movie Theater	76,759	197,007
	Route 175 Commercial	Retail Building	64,113	
	Giant Foods	Grocery Store	56,135	
TOTAL				840,050

I-95 Corridor and 197,000 square feet are in Columbia.

Permits of more than 100,000 square feet include the new Giant Foods distribution warehouse in the Exeter Industrial Park. This is a very large warehouse at about 342,000 square feet. Another large 120,000 square foot warehouse was built in the Dorsey Woods subdivision. Map 20 shows the locations of these larger projects.

Five Year Results

Over the last five years from October 1, 1998 to September 30, 2003, 734 non-residential building permits were issued for new construction (Table 66). This is an average of about 145 permits per year. Over the five year period Columbia had the greatest number of issued permits with 260, about 35 percent of the total. The I-95 Corridor had 186 issued permits (25 per-

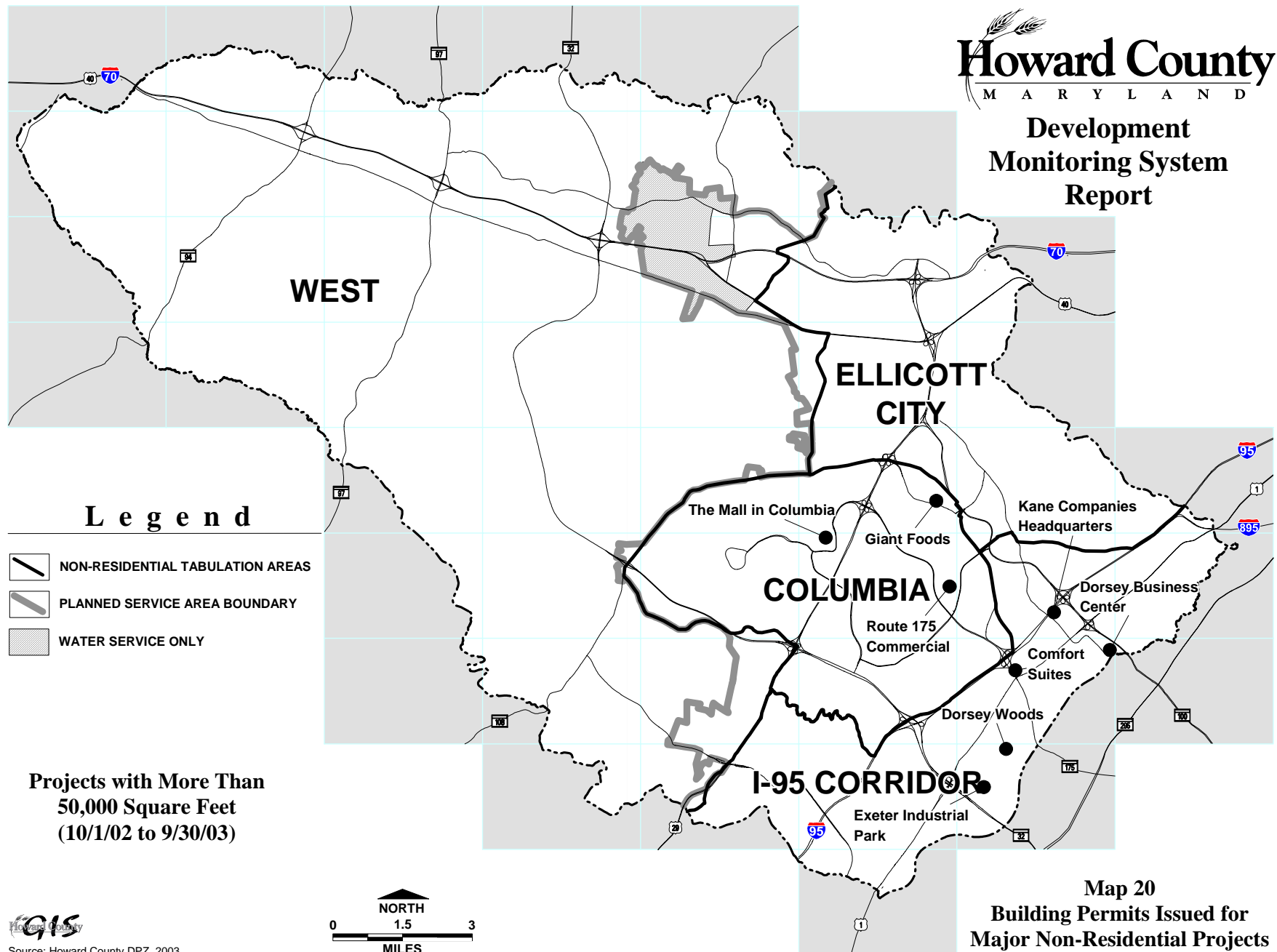
cent). The West and Ellicott City had 163 and 125 issued permits, about 22 and 17 percent of the total each, respectively.

Table 67 summarizes the square footage in issued building permits by development type for each of the last five years. The five year total is also shown in the bottom right hand corner of the table. For the five year period, building permits for almost 13.3 million square feet of non-residential space have been issued in the County. This is an average of about 2.7 million square feet per year.

Of this total, almost 43 percent or 5.67 million square feet are for office/service space. About 35 percent or 4.64 million square feet are for manufacturing/extensive industrial space. Government and institutional uses account for about 10.5 percent of the total with about 1.4 million square feet. Retail uses account for 10.3 percent of the total (1.37 million

Table 66
Issued Non-Residential Building Permits, 10/01/98 to 9/30/03

Region	10/98-9/99	10/99-9/00	10/00-9/01	10/01-9/02	10/02-9/03	TOTAL	PERCENT
Columbia	77	81	49	30	23	260	35%
Ellicott City	29	32	20	22	22	125	17%
I-95 Corridor	48	33	45	27	33	186	25%
West	41	35	31	23	33	163	22%
TOTAL	195	181	145	102	111	734	100%



square feet. The remaining 1.7 percent (224,631 square feet) are for other uses.

Chart 26 graphically shows the countywide square footage by development type for each of the five years. It is clear that there has been a significant drop in the total amount of square footage issued in building permits for the last two years compared to the previous 3 years. Last year's total of about 1.6 million square feet was only about 45 percent of the peak total of 3.5 million square feet in 1998/99.

Chart 27 shows the five year square footage total by development type by region. It is apparent that most of the development over the last five years is for manufacturing/extensive industrial and office/service uses. Furthermore, it is clear that most of the manufacturing/extensive industrial development is in the I-95 Corridor and most of the office/service development is in the Columbia region. Columbia also has the most retail

development, followed by Ellicott City.

Chart 28 shows the total non-residential square footage in issued building permits over time for each region. For most years, Columbia and the I-95 Corridor had the most development, followed by the West and Ellicott City. The steady decline of development in Columbia is also apparent. This is primarily a result of declining development in the Gateway Industrial Park as it approaches buildout.

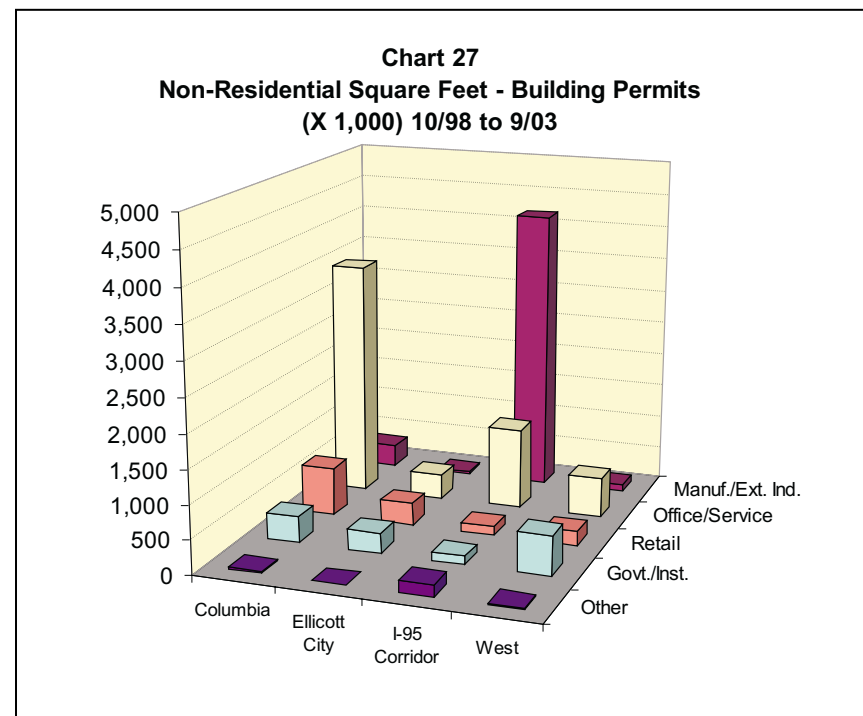
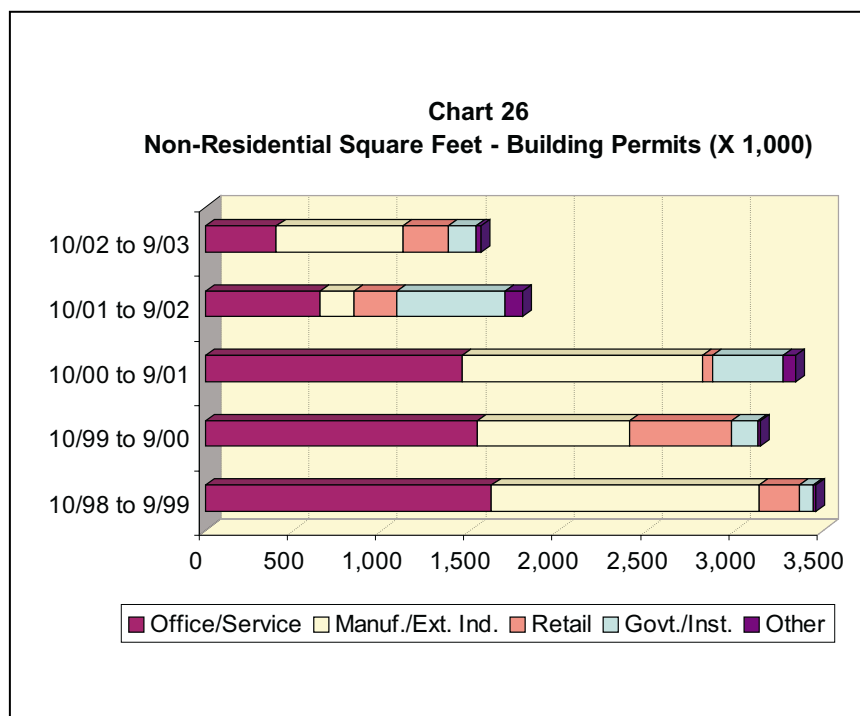
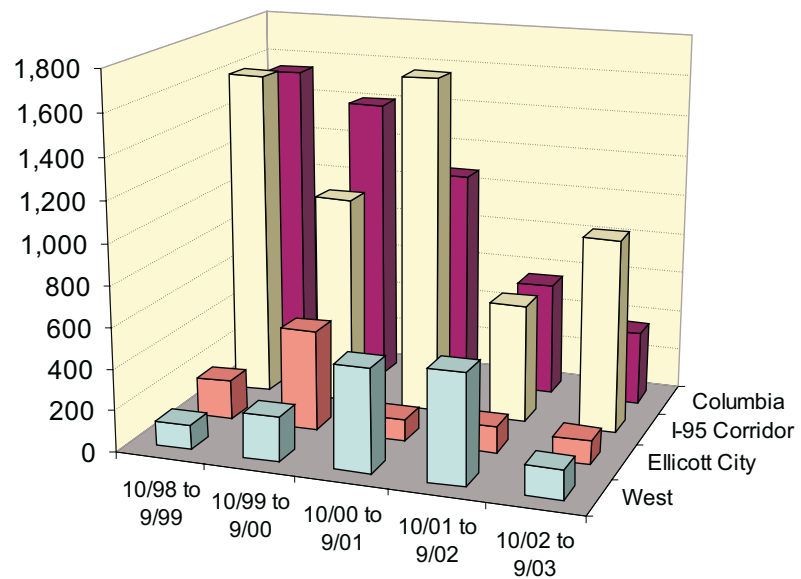


Table 67
Square Feet of Issued Non-Residential Building Permits by Type, 10/01/98 to 9/30/03

10/98 to 9/99							10/99 to 9/00					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	99,515	1,307,173	95,230	31,179	13,334	1,546,431	189,341	1,099,040	82,805	28,579	7,276	1,407,041
Ellicott City	52,402	113,179	24,250	0	0	189,831	207,918	164,672	0	116,731	613	489,934
I-95 Corridor	47,074	162,882	1,391,075	0	2,926	1,603,957	56,090	183,021	779,952	4,340	1,280	1,024,683
West	33,064	38,675	0	45,728	0	117,467	125,007	90,146	0	0	3,864	219,017
TOTAL	232,055	1,621,909	1,510,555	76,907	16,260	3,457,686	578,356	1,536,879	862,757	149,650	13,033	3,140,675
PERCENT	6.7%	46.9%	43.7%	2.2%	0.5%	100.0%	18.4%	48.9%	27.5%	4.8%	0.4%	100.0%
10/00 to 9/01							10/01 to 9/02					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	41,517	780,955	142,504	111,374	0	1,076,350	161,691	175,090	6,600	208,907	5,412	557,700
Ellicott City	6,477	64,269	0	34,408	0	105,154	24,088	22,699	0	78,323	0	125,110
I-95 Corridor	5,120	454,641	1,116,151	8,690	67,898	1,652,500	13,093	191,726	181,257	100,169	94,990	581,235
West	5,060	151,677	102,539	245,439	0	504,715	43,809	262,229	0	229,036	0	535,074
TOTAL	58,174	1,451,542	1,361,194	399,911	67,898	3,338,719	242,681	651,744	187,857	616,435	100,402	1,799,119
PERCENT	1.7%	43.5%	40.8%	12.0%	2.0%	100.0%	13.5%	36.2%	10.4%	34.3%	5.6%	100.0%
10/02 to 9/03							TOTAL 10/98 to 9/03					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	218,368	124,803	0	14,142	160	357,473	710,432	3,487,061	327,139	394,181	26,182	4,944,995
Ellicott City	35,386	10,303	0	71,195	1,105	117,989	326,271	375,122	24,250	300,657	1,718	1,028,018
I-95 Corridor	2,986	213,322	714,670	9,940	4,078	944,996	124,363	1,205,592	4,183,105	123,139	171,172	5,807,371
West	0	55,505	0	63,527	21,695	140,727	206,940	598,232	102,539	583,730	25,559	1,517,000
TOTAL	256,740	403,933	714,670	158,804	27,038	1,561,185	1,368,006	5,666,007	4,637,033	1,401,707	224,631	13,297,384
PERCENT	16.4%	25.9%	45.8%	10.2%	1.7%	100.0%	10.3%	42.6%	34.9%	10.5%	1.7%	100.0%

1. Includes community centers, pavillions, pump houses, guard shack, storage sheds, utility bldgs, storage space and other such building types.

Chart 28
Non-Residential Square Feet - Building Permits
(X 1,000)



Employment Estimates

To estimate employment several steps were taken. First, employment estimates as indicated on site development plans were used. If this was not available, then employment was estimated based on the standard square feet per employee factors shown in Table 68. These factors are multiplied times the square footage of planned building space which is included on site development plans and building permits. In some cases, particularly for government and institutional uses and schools and religious facilities, owners or representatives of the property were contacted to determine potential employment.

Table 68
Square Feet per Employee Standard Factors

Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	250

The first section below estimates employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation and the U.S. Bureau of Economic Analysis.

Estimated Employment from Site Development Plans

Last Year's Results

Space in site development plans approved last year from October 1, 2002 to September 30, 2003 could accommodate an estimated 2,528 employees (Table 69). About 44 percent of the potential jobs are located in Columbia, where they are mostly office/service jobs. About 37 percent of the poten-

Table 69
Potential Employment from Approved Non-Residential SDP's
By Use Category, 10/01/02 to 9/30/03

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	354	750	0	0	10	1,114	44%
Ellicott City	3	40	0	61	13	117	5%
I-95 Corridor	78	312	531	15	0	936	37%
West	105	48	5	18	186	361	14%
TOTAL	539	1,150	536	94	209	2,528	100%
PERCENT	21%	45%	21%	4%	8%	100%	

tial jobs are in the I-95 Corridor, mostly manufacturing/extensive industrial jobs. About 14 percent of the jobs are in the West and 5 percent are in Ellicott City.

Countywide, 1,150 potential jobs, or about 45 percent of the total, are office/service jobs. This is followed by 21 percent each for retail and manufacturing/extensive industrial jobs, 8 percent for schools and religious facilities jobs and 4 percent for government and institutional jobs.

Five Year Results

Tables 70 and 71 show the potential employment from approved site development plans over the last five years, from October 1, 1998 to September

Table 70
Potential Employment from Approved Non-Residential SDP's
By Use Category, 10/01/98 to 9/30/03

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	1,123	12,304	653	127	92	14,298	48%
Ellicott City	821	1,450	1	326	112	2,710	9%
I-95 Corridor	388	4,996	3,924	15	128	9,451	32%
West	749	2,176	5	110	439	3,478	12%
TOTAL	3,081	20,925	4,582	578	771	29,938	100%
PERCENT	10%	70%	15%	2%	3%	100%	

Table 71
Potential Employment from Approved Non-Residential Site Development Plans

Region	10/98 to 9/99	10/99 to 9/00	10/00 to 9/01	10/01 to 9/02	10/02 to 9/03	TOTAL	PERCENT
Columbia	4,198	3,961	3,993	1,032	1,114	14,298	48%
Ellicott City	872	1,477	132	112	117	2,710	9%
I-95 Corridor	1,025	2,359	4,615	516	936	9,451	32%
West	643	654	332	1,488	361	3,478	12%
TOTAL	6,738	8,451	9,072	3,148	2,528	29,938	100%
PERCENT	23%	28%	30%	11%	8%	100%	

30, 2003. Over the five year period, the total comes to 29,938 new jobs, an average of 5,988 jobs per year. Table 71 shows that there has been a steady increase in new jobs annually based on approved SDP's since 1998, ranging from 6,738 in 98/99 to 9,072 in 00/01. Since then, however, there has been a sharp decline to 3,148 jobs in 01/02 and only 2,528 in 02/03.

Similar to the one year results, the greatest percentage of the jobs are located in Columbia with 48 percent of the total. The I-95 Corridor has 32 percent of the total, followed by 12 percent in the West and 9 percent in Ellicott City. Most of the new jobs are office/service jobs followed by manufacturing/extensive industrial jobs and then retail jobs. Jobs for government and institutional and schools and religious facilities comprise only 5 percent of the total.

Estimated Employment from Building Permits

Last Year's Results

An estimated 3,066 new jobs are projected based on issued building permits last year from October 1, 2002 to September 30, 2003 (Table 72). About 52 percent of the potential jobs, mostly office/service and manufacturing/extensive industrial jobs, are located in the I-95 Corridor. About 34 percent of the jobs are in Columbia. The remaining 8 percent of the jobs are in the West and 6 percent are in Ellicott City.

Countywide, 1,616 potential jobs, or about 53 percent of the total, are office/service jobs. This is followed by 23 percent manufacturing/extensive

Table 72
Potential Employment from Issued Non-Residential Building Permits
By Use Category, 10/01/02 to 9/30/03

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	546	500	0	0	3	1,049	34%
Ellicott City	88	41	0	33	11	174	6%
I-95 Corridor	7	853	715	15	0	1,590	52%
West	0	222	0	0	31	253	8%
TOTAL	642	1,616	715	48	45	3,066	100%
PERCENT	21%	53%	23%	2%	1%	100%	

industrial jobs. Retail jobs make up 21 percent of the total. The remaining 3 percent are government and institutional and schools and religious facilities jobs.

Five Year Results

Tables 73 and 74 show the potential employment from issued building permits over the last five years, from October 1, 1998 to September 30, 2003. Over the five year period, the estimate results in 29,528 new jobs, an average of about 5,905 jobs per year.

As expected, the greatest percentage of the jobs are located in Columbia with about 51 percent of the total. The I-95 Corridor has about 31 percent of the total, followed by 11 percent in the West and 7 percent in Ellicott

Table 73
Potential Employment from Issued Non-Residential Building Permits

Region	10/98 to 9/99	10/99 to 9/00	10/00 to 9/01	10/01 to 9/02	10/02 to 9/03	TOTAL	PERCENT
Columbia	5,446	4,436	3,444	681	1,049	15,056	51%
Ellicott City	315	981	296	161	174	1,927	7%
I-95 Corridor	2,276	1,348	2,954	1,058	1,590	9,226	31%
West	208	664	949	1,244	253	3,319	11%
TOTAL	8,245	7,429	7,643	3,144	3,066	29,528	100%
PERCENT	28%	25%	26%	11%	10%	100%	

Table 74
Potential Employment from Issued Non-Residential Building Permits
By Use Category, 10/01/98 to 9/30/03

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	1,637	13,073	198	53	96	15,056	51%
Ellicott City	693	1,060	4	38	132	1,927	7%
I-95 Corridor	172	4,504	4,452	15	83	9,226	31%
West	543	2,305	103	90	278	3,319	11%
TOTAL	3,045	20,941	4,756	197	589	29,528	100%
PERCENT	10%	71%	16%	1%	2%	100%	

City. Most of the new jobs are office/service jobs followed by manufacturing/extensive industrial jobs and then retail jobs. Jobs for the government and institutional and school and religious facilities categories comprise only about 3 percent of the total.

State of Maryland Employment Estimates

The previous sections estimate *potential* employment from new development. This section provides an overview of estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation (DLLR). This would include a potential increase in employment from new development as well as any change in the number of jobs in existing building space. The latter would generally be impacted by changes in vacancy rates associated with the economy. It could also be a result of the

re-configuration of existing building space resulting in more (or less) jobs per square foot. An example of this is the re-configuration of a warehouse to office use.

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance (UI) Law of Maryland and the unemployment compensation for federal employees (UCFE) program. Together these two account for approximately 98 percent of all wage and salary civilian employment. Since wage and salary employment represents approximately 93 percent of total civilian employment, DLLR estimates that their data reflects over 91 percent of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 20 percent of Howard County's employment in 2001 was not reported by the State.

Table 75 shows both DLLR and BEA employment data and the annual increase from 1998 to 2003. BEA data generally has a two year lag time resulting in no available data for 2002 and 2003. Observing the most recent State data, reflecting the first quarter employment data for each year, there has been an average increase of about 4,500 jobs per year for the last five years. Last year, from 2002 to 2003, the State reports a slight loss of 107 jobs.

Table 76 shows the jobs and average wages by job type as reported by the State for the first quarter of 2002 and 2003. In the first quarter of 2003, the State reported that there were 133,231 jobs in Howard County with an av-

average weekly wage of \$819. This compares to 133,338 jobs one year earlier with an average wage of \$799. This is net decrease of 107 jobs and about a 2.5 percent increase in average wages.

Table 75
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Increase	Jobs	Increase
1998	110,728		148,356	
1999	117,775	7,047	155,485	7,129
2000	124,843	7,068	161,085	5,600
2001	130,717	5,874	166,152	5,067
2002	133,338	2,621	NA	NA
2003	133,231	(107)	NA	NA
Average		4,501		

1. Maryland State Department of Labor, Licensing and Regulation

(1st quarter employment)

2. U.S. Bureau of Economic Analysis (annual employment)

Table 76
Jobs and Wages by Industry, 2002 and 2003¹

Job Type	2002		2003	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	716	\$1,101	682	\$1,089
State Government	3,867	\$821	3,892	\$694
Local Government	11,380	\$720	11,649	\$730
Subtotal/Average	15,963	\$762	16,223	\$736
Goods Producing				
Natural Resources and Mining	272	\$448	264	\$417
Construction	11,032	\$910	10,985	\$957
Manufacturing	7,246	\$978	6,492	\$995
Subtotal/Average	18,550	\$930	17,741	\$963
Service Providing				
Trade, Transportation, and Utilities	35,715	\$719	35,806	\$734
Information	2,083	\$1,113	1,886	\$1,118
Financial Activities	8,089	\$1,180	8,596	\$1,419
Professional and Business Services	26,063	\$1,042	25,895	\$1,041
Education and Health Services	12,094	\$623	12,250	\$619
Leisure and Hospitality	11,001	\$262	11,116	\$271
Other Services	3,638	\$533	3,636	\$516
Subtotal/Average	98,682	\$781	99,185	\$807
Unclassified	142	\$598	83	\$646
TOTAL	133,338	\$799	133,231	\$819

1. State Department of Labor, Licensing and Regulation (1st quarter employment)

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